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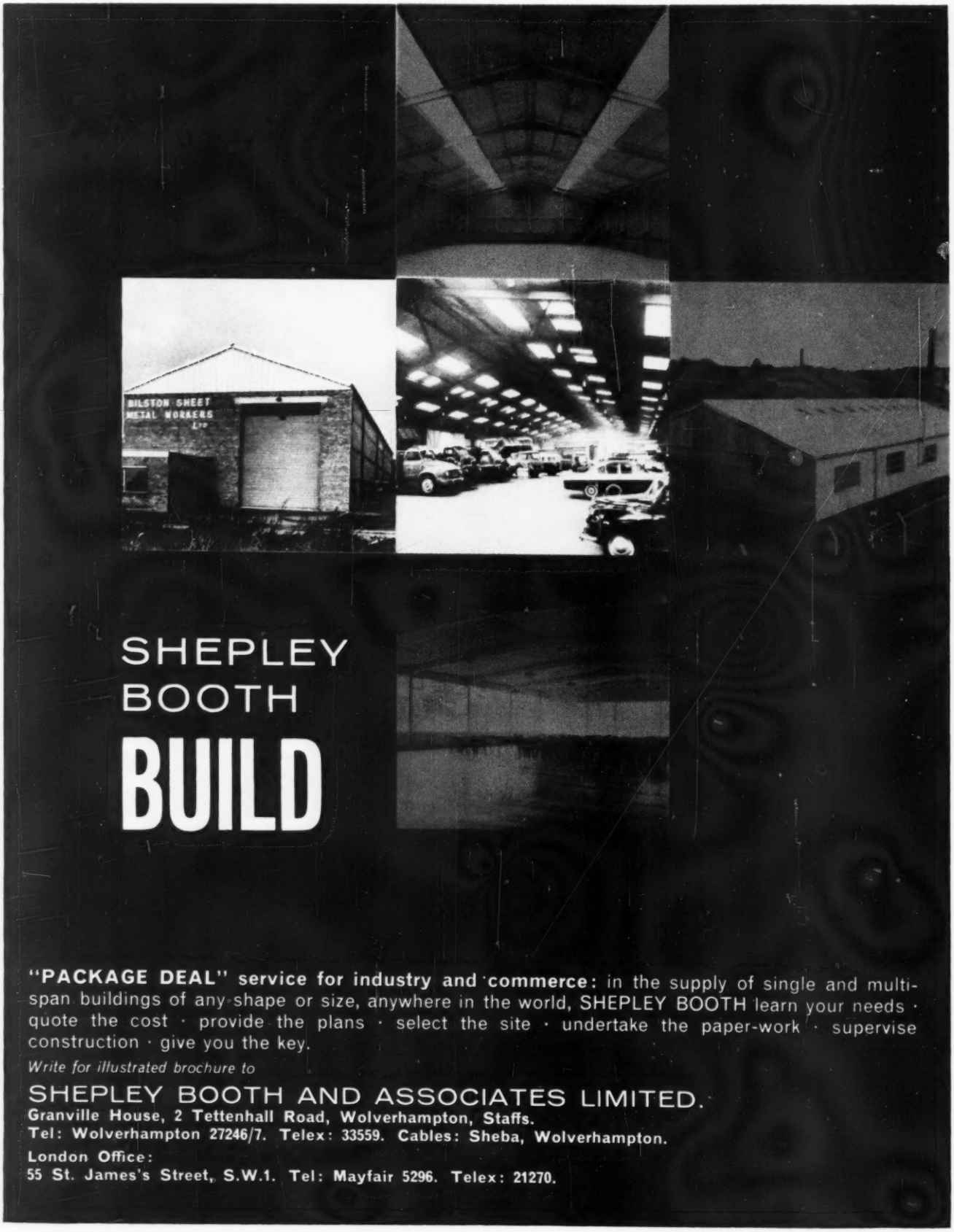

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Front cover photograph

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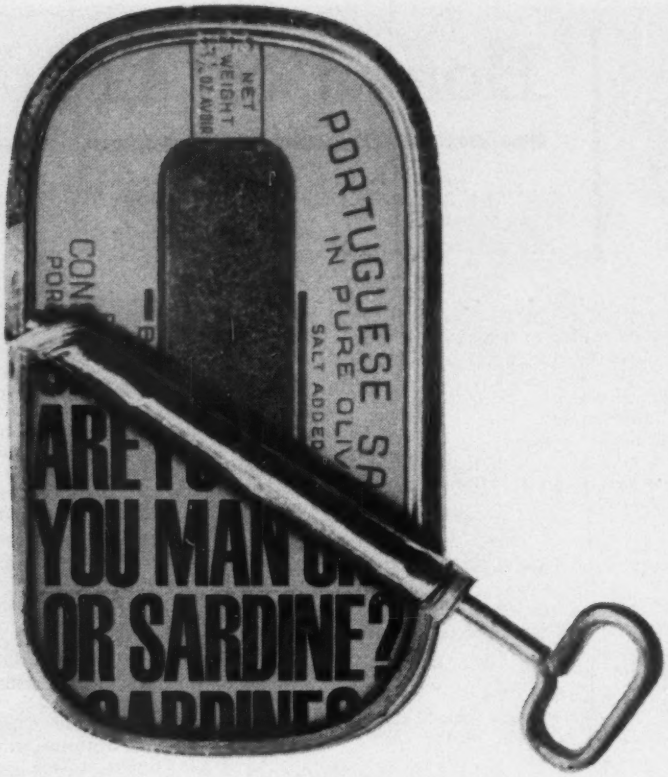

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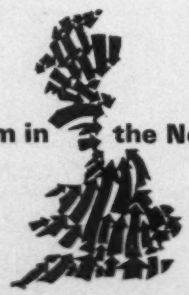

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EFTA: A Progress Report

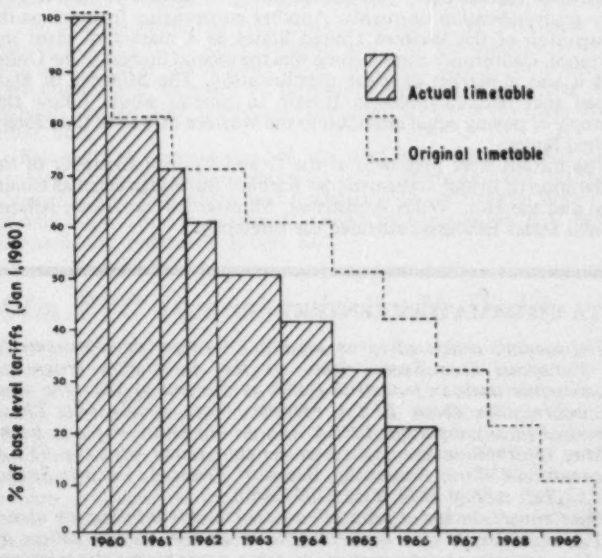
Ministers of the member countries of the European Free Trade Association will be meeting in Edinburgh for the first time on July 9 and 10. The chairmanship of the EFTA council passes by rotation between Member States at six monthly intervals, and by tradition each Member State acts as host for a ministerial meeting during its period in the chair. Mr. Edward Heath, Secretary of State for Industry, Trade and Regional Development, will take the chair. Also in the United Kingdom delegation will be Lord Dundee, Minister of State for Foreign Affairs, Mr. Edward du Cann, Minister of State, Board of Trade, and Mr. Maurice Macmillan, Economic Secretary to the Treasury. This is the second EFTA Ministerial Meeting to be held in the United Kingdom whose turn in the chair has now come round again; the first was held in London in June 1961. EFTA has come a long way in the three years' interval: the London and Edinburgh meetings are therefore convenient points from which to review the development of the Association.

THE 'LONDON COMMUNIQUE' of June 1961 is one of the basic documents in EFTA's history, for in it the member states pledged themselves to co-ordinate their actions and remain united throughout the subsequent negotiations with the European Economic Community. It was a time when the immediate future of EFTA was bound up with the wider question of European integration. The sudden interruption, however, early in 1963 of the United Kingdom-EEC negotiations made necessary a reappraisal of EFTA itself.

Strengthening the Association

At Geneva and Lisbon in 1963 the EFTA ministers attended to the task of strengthening the Association. First they decided to speed up the Association's timetable for dismantling protective tariffs and quantitative restrictions on EFTA goods in order to achieve virtual free trade in industrial goods by the end of 1966 – three years ahead of the original schedule laid down in the Stockholm Convention (see Fig. 1). Secondly, to facilitate an expansion of agricultural trade, they agreed to put in hand the annual reviews of agricultural trade provided for in the Convention; a number of bilateral concessions on agricultural iterms of particular interest to certain members were also agreed, notably the suspension of the UK tariff on butter. Thirdly, they established an Economic Development Committee, which will help to extend economic co-operation between member countries, by sharing experience on general questions affecting economic development such as problems of regional development and techniques of financing industry, and also by acting as a clearing house for promotion and facilitating co-operation on specific problems, e.g. setting up of new industries, promotion of exports.

Fig. 1: Cutting EFTA tariffs



Note:

This diagram shows the original and revised timetables for the removal of protective tariffs in member states on those goods qualifying for EFTA tariff treatment. On certain goods, however, Portugal, Norway and Finland are following different timetables.

Now that the main lines of EFTA development over the next few years have been settled by the Lisbon agreements, Member States have been devoting increasing attention to the wider problems of ensuring that the free trade area functions satisfactorily. Dismantling tariffs and quantitative restrictions is not in itself sufficient to ensure an effective free trade area. As these restrictions disappear it becomes necessary to look more closely at other less obvious barriers to trade. The EFTA Convention already contains certain Articles dealing with this kind of problem, known as the 'rules of competition.' These deal with such subjects as the elimination of discrimination in favour of domestic production in the purchasing policies of public authorities in Member States; the control of restrictive business practices affecting EFTA trade; and the rights of a citizen of one EFTA country to establish and operate a business in another. Working parties have been set up to review the working of these Articles.

In addition Ministers have instructed that an examination be put in hand of complaints from industries in Member countries about other administrative practices which may not fall under any specific provision of the Convention but may nevertheless have the effect of hampering trade, for example, unreasonably stringent safety or health provisions complicated registration procedures for products, etc. Ministers have also recognised that differing national industrial standards can cause difficulties, and have instructed a Working Party to examine the scope for EFTA co-operation in encouraging the adoption of standards which would have the widest possible application, both in Europe and elsewhere.

The Stockholm Convention which laid the foundation of the Association is essentially a pragmatic document and does not provide for every contingency. It is a foundation on which further rules can be built as they are shown to be necessary in the light of experience. In building up the Economic Development Committee the EFTA states are already moving into an area of practical co-operation not envisaged in the original machinery of consultation; similarly in dealing with non-tariff barriers to trade they will in effect be filling in gaps in the Stockholm Convention. There is still

(Continued on next page)

'TRADING WITH ITALY'

'Trading with Italy', a 64-page illustrated supplement dealing with trade between Britain and Italy, is included in this week's issue of the *Board of Trade Journal*. The supplement was written before the resignation of Signor Moro, the Italian Prime Minister, on June 26. Signor Moro and his Ministers are retaining their portfolios in a caretaker capacity.

Additional copies of the supplement are available free of charge from the Board of Trade Library, 1 Victoria Street, London, S.W.1.

CORRECTION: *In the advertisement for Instituto Mobiliare Italiano on page 9 of the supplement, the lire totals given for 'Loans outstanding' and 'Bonds in circulation' should be transposed.*

EFTA – A PROGRESS REPORT

much detailed work to be done, and this is reflected in the recent multiplication of working parties and study groups at EFTA Secretariat headquarters in Geneva. Review of their progress can be expected to be an important part of the deliberations of the ministerial meeting next week in Edinburgh.

External relations

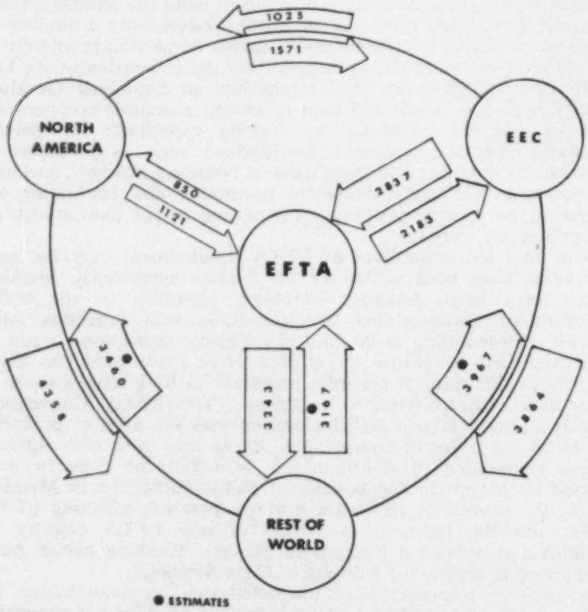
Turning their attention to external relations the ministers at Edinburgh are expected to concern themselves with the preparations for the Kennedy Round of multilateral trade negotiations, the results of the recent United Nations Conference on Trade and Development, and the latest developments in relations with the EEC. The success of the Kennedy Round could be an important means of mitigating the effects of the economic division of Europe which is so illogical in the face of the importance of intra-European trade (see Fig. 2). The EFTA countries have already made clear their support for the concept of a 50 per cent linear tariff cut. In relation to the developing countries of the world they have individually played a constructive part in the recent United Nations Trade and Development Conference (as witnessed by the Anglo-Swedish initiative in the field of supplementary financial assistance), and can be expected to support the continuing work of the Conference. There can now be no doubt about the liberal rôle of EFTA countries in the development of international trade.

In the three years since EFTA ministers met in London EFTA countries have continued their efforts to achieve the world wide reduction of barriers to trade. But it has also been a period of internal consolidation. In order to play an effective part internationally it is important for the EFTA countries to make a success of their own free trade area. Since early 1963 EFTA has entered a new phase – a period of intensified activity now made even more urgent by the awareness that the full achievement of the industrial free trade area is only two and a half years away.

Fig. 2: The flow of trade: 1963

EFTA – EEC – North America – Rest of World

The arrows indicate the direction of exports (all figures f.o.b.). The figures in the arrow are in £ million.



Source: GATT and Board of Trade.

Mr. Edward Heath welcomes increasing trade with EEC

'I AM GLAD to say that our trade with EEC as a whole is doing well – and with the Netherlands particularly well,' said Mr. Edward Heath, Secretary of State for Industry, Trade and Regional Development, speaking at a lunch given by the Netherlands Chamber of Commerce in London on June 24.

Referring to the United Kingdom Trade Statistics (see *Board of Trade Journal*, June 26, page 1384/86) the Secretary of State reminded his audience that these figures allowed for seasonal factors, and said that our exports to EEC in May – £76 million – brought the figure for the three months March-May to £221 million – 7 per cent higher than in the previous three months.

'The Netherlands play a very important part in this,' continued the Secretary of State. 'Our exports to them are almost a quarter of our exports to the Community as a whole. And our trade with the Netherlands is growing even faster.'

The May figure – £17 million – brought the three months March-May to £51 million. This was 14 per cent higher than the previous three months and 20 per cent higher than in March-May a year ago. We were seeing a substantial and a steady growth.

The Secretary of State said that he was glad to see that British goods were still competitive within the Community in spite of growing tariff discrimination. It was of great importance to reduce this difference between the two groups in Europe.

Concluding, the Secretary of State said: 'I am glad too, as I always am, to see trade growing on both sides. Our imports from the Netherlands are very nearly the same as our exports there – you send us a little more than we send you.

'And your exports to us are growing too – £56 million in March-May as compared with £50 million a year ago – a 12 per cent increase. Not so large as the increase in our exports to you, but still very healthy and substantial.'

Minister of State presents gold medals to British fabric firms

FIFTY-EIGHT GOLD MEDALS, won by British firms who took part at the International Fabrics Exposition at Sacramento, California in May, were presented in London on June 26, by Mr. Edward Du Cann, Minister of State, Board of Trade.

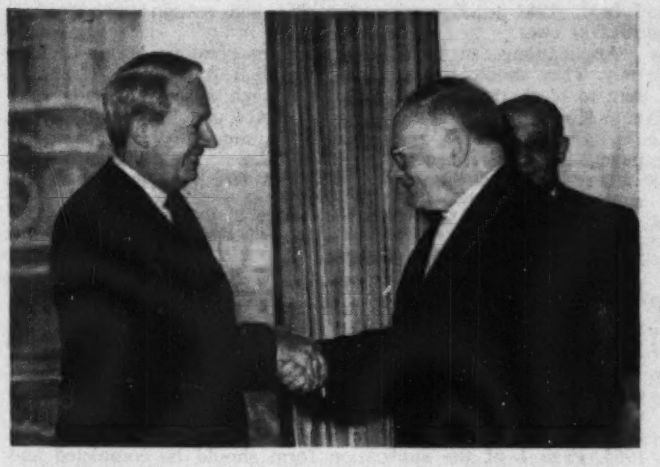
Congratulating the award-winners, the Minister of State said that the consistency of achievement – British firms have won an increasing number of medals every year except in 1961 – seemed to him to be a very great indication of quality. Another encouraging feature was the recognition of the Western United States as a market of great importance. California's state income was the second highest in the Union and it was a market of great sophistication. The Minister of State hoped that manufacturers in Britain in general would follow this example of paying equal attention to the Western as well as the Eastern United States.

The medals were presented at the Grand Council Chamber of the Federation of British Industries. Sir Richard Burbridge acted as Chairman and the Hon. Willis Armstrong, Minister for Economic Affairs, United States Embassy, attended the ceremony.

EFTA INFORMATION CENTRE

The leading article gives an account of recent developments in the European Free Trade Area. As the Association progresses towards free trade in industrial goods by the end of 1966, *the need for information about EFTA becomes more widely felt. Those interested in any aspect of EFTA who do not know where to begin seeking information are invited to get into touch with the EFTA Information Centre, Room* 527, *Board of Trade,* 1, *Victoria Street, S.W.*1. (*Tel. Abbey* 7877, *Ext.* 2479/2480).

The Centre is intended primarily to disseminate information about EFTA activities. It also answers general queries, directs callers to the best sources of information in other government departments and other parts of the Board of Trade, and produces 'EFTA Topics', a free quarterly digest of published material about activities and attitudes connected with the Association. The summer number of this publication will be available on July 7 *next from Publications Division, Central Office of Information, Hercules Road, London, S.E.*1.



Mr. Edward Heath (left), Secretary of State for Industry, Trade and Regional Development, greeting Mr. M. V. Nesterov, President of the Russian Chamber of Commerce, at the Board of Trade, London, on June 26. Mr. Nesterov is leading a trade mission to this country in response to the recent London Chamber of Commerce Mission to the USSR

Europe's 'most advanced' man-made fibres spinning plant opened in N. Ireland

WHAT IS SAID to be the most advanced man-made fibres spinning plant in Europe, the £300,000 40,000 sq. ft. Government-built factory of McCleery and L'Amie Ltd., was officially opened at Saintfield, Co. Down, on June 22 by the Prime Minister of Northern Ireland, Captain Terence O'Neill.

Production will be mainly of synthetic hand and machine knitting yarns, principally Prismar, a 100 per cent Acrilan Atoz-processed yarn. The plant, however, can also spin wool and wool-synthetic blend yarns. Production capacity exceeds 2 million lbs. per year.

The new company has been created by Mr. B. H. McCleery and Mr. G. J. C. L'Amie. They designed and built the machinery which will Atoz-process the Acrilan fibre. McCleery and L'Amie are the first commercial spinners in the world licensed to use the Atoz process, though fibre producers may insert the Atoz property in the basic fibre.

The vertical organization of the McCleery and L'Amie plant enables it also to spin as required any man-made fibre, including Courtelle, Terylene, nylon and Spandex – an elastomeric fibre – all of which are made in Northern Ireland by Courtaulds, ICI, British Enkalon and Polythane Fibres Ltd.

£4m PVC expansion in South Wales

BRITISH GEON Limited, a company in Distillers Chemicals and Plastics Group, is to make a major extension to its factory for producing polyvinyl chloride (PVC) at Barry in South Wales. British Geon is owned jointly by D.C.L. and B. F. Goodrich Chemical Company of America. The factory manufactures vinyl chloride monomer which is then polymerized to produce PVC. Its present polymerization capacity, recently increased to 70,000 tons per annum, will now be increased to 90,000 tons by the first half of 1965. Plans for further increases are expected to be announced before the end of this year.

The construction of the new acetylene plant will begin shortly. It is expected to be in production during the first half of 1966. By the same time the existing monomer capacity will be raised to 130,000 tons, to allow for future increases in polymerization capacity. The total cost of the new plant, the extensions to monomer capacity and off-site services will be about £4 million.

Two more factories for Cumbernauld

CUMBERNAULD DEVELOPMENT Corporation have announced two more industrial organizations who have taken factory space in the new town.

The carpet making firm of John Lyle & Co. Ltd., of Bridgeton, Glasgow, have taken on lease a 22,000 sq. ft. advance factory at Blairlinn, for the expansion of their main operations. This factory will initially employ at least 50 people and early occupation is expected.

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EFTA – A PROGRESS REPORT

much detailed work to be done, and this is reflected in the recent multiplication of working parties and study groups at EFTA Secretariat headquarters in Geneva. Review of their progress can be expected to be an important part of the deliberations of the ministerial meeting next week in Edinburgh.

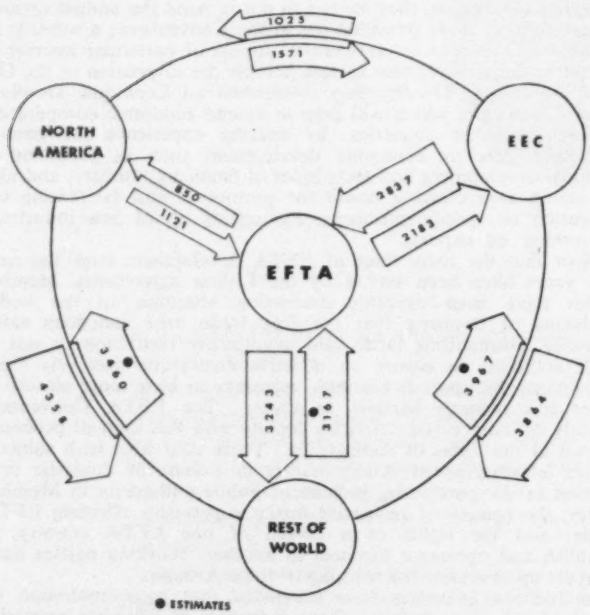
External relations

Turning their attention to external relations the ministers at Edinburgh are expected to concern themselves with the preparations for the Kennedy Round of multilateral trade negotiations, the results of the recent United Nations Conference on Trade and Development, and the latest developments in relations with the EEC. The success of the Kennedy Round could be an important means of mitigating the effects of the economic division of Europe which is so illogical in the face of the importance of intra-European trade (see Fig. 2). The EFTA countries have already made clear

Fig. 2: The flow of trade: 1963

EFTA – EEC – North America – Rest of World

The arrows indicate the direction of exports (all figures f.o.b.). The figures in the arrow are in £ million.



Source: GATT and Board of Trade.

their support for the concept of a 50 per cent linear tariff cut. In relation to the developing countries of the world they have individually played a constructive part in the recent United Nations Trade and Development Conference (as witnessed by the Anglo-Swedish initiative in the field of supplementary financial assistance), and can be expected to support the continuing work of the Conference. There can now be no doubt about the liberal rôle of EFTA countries in the development of international trade.

In the three years since EFTA ministers met in London EFTA countries have continued their efforts to achieve the world wide reduction of barriers to trade. But it has also been a period of internal consolidation. In order to play an effective part internationally it is important for the EFTA countries to make a success of their own free trade area. Since early 1963 EFTA has entered a new phase – a period of intensified activity now made even more urgent by the awareness that the full achievement of the industrial free trade area is only two and a half years away.

Mr. Edward Heath welcomes increasing trade with EEC

'I AM GLAD to say that our trade with EEC as a whole is doing well – and with the Netherlands particularly well,' said Mr. Edward Heath, Secretary of State for Industry, Trade and Regional Development, speaking at a lunch given by the Netherlands Chamber of Commerce in London on June 24.

Referring to the United Kingdom Trade Statistics (see *Board of Trade Journal*, June 26, page 1384/86) the Secretary of State reminded his audience that these figures allowed for seasonal factors, and said that our exports to EEC in May – £76 million – brought the figure for the three months March-May to £221 million – 7 per cent higher than in the previous three months.

'The Netherlands play a very important part in this,' continued the Secretary of State. 'Our exports to them are almost a quarter of our exports to the Community as a whole. And our trade with the Netherlands is growing even faster.'

The May figure – £17 million – brought the three months March-May to £51 million. This was 14 per cent higher than the previous three months and 20 per cent higher than in March-May a year ago. We were seeing a substantial and a steady growth.

The Secretary of State said that he was glad to see that British goods were still competitive within the Community in spite of growing tariff discrimination. It was of great importance to reduce this difference between the two groups in Europe.

Concluding, the Secretary of State said: 'I am glad too, as I always am, to see trade growing on both sides. Our imports from the Netherlands are very nearly the same as our exports there – you send us a little more than we send you.

'And your exports to us are growing too – £56 million in March-May as compared with £50 million a year ago – a 12 per cent increase. Not so large as the increase in our exports to you, but still very healthy and substantial.'

Minister of State presents gold medals to British fabric firms

FIFTY-EIGHT GOLD MEDALS, won by British firms who took part at the International Fabrics Exposition at Sacramento, California in May, were presented in London on June 26, by Mr. Edward Du Cann, Minister of State, Board of Trade.

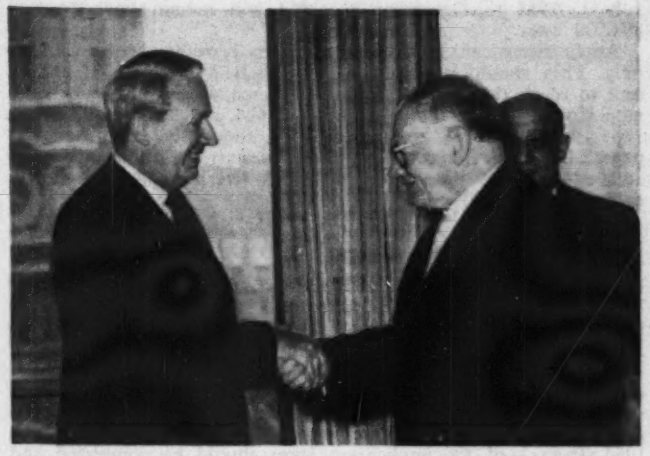
Congratulating the award-winners, the Minister of State said that the consistency of achievement – British firms have won an increasing number of medals every year except in 1961 – seemed to him to be a very great indication of quality. Another encouraging feature was the recognition of the Western United States as a market of great importance. California's state income was the second highest in the Union and it was a market of great sophistication. The Minister of State hoped that manufacturers in Britain in general would follow this example of paying equal attention to the Western as well as the Eastern United States.

The medals were presented at the Grand Council Chamber of the Federation of British Industries. Sir Richard Burbridge acted as Chairman and the Hon. Willis Armstrong, Minister for Economic Affairs, United States Embassy, attended the ceremony.

EFTA INFORMATION CENTRE

The leading article gives an account of recent developments in the European Free Trade Area. As the Association progresses towards free trade in industrial goods by the end of 1966, the need for information about EFTA becomes more widely felt. Those interested in any aspect of EFTA who do not know where to begin seeking information are invited to get into touch with the EFTA Information Centre, Room 527, Board of Trade, 1, Victoria Street, S.W.1. (Tel. Abbey 7877, Ext. 2479/2480).

The Centre is intended primarily to disseminate information about EFTA activities. It also answers general queries, directs callers to the best sources of information in other government departments and other parts of the Board of Trade, and produces 'EFTA Topics', a free quarterly digest of published material about activities and attitudes connected with the Association. The summer number of this publication will be available on July 7 next from Publications Division, Central Office of Information, Hercules Road, London, S.E.1.



Mr. Edward Heath (left), Secretary of State for Industry, Trade and Regional Development, greeting Mr. M. V. Nesterov, President of the Russian Chamber of Commerce, at the Board of Trade, London, on June 26. Mr. Nesterov is leading a trade mission to this country in response to the recent London Chamber of Commerce Mission to the USSR

Europe's 'most advanced' man-made fibres spinning plant opened in N. Ireland

WHAT IS SAID to be the most advanced man-made fibres spinning plant in Europe, the £300,000 40,000 sq. ft. Government-built factory of McCleery and L'Amie Ltd., was officially opened at Saintfield, Co. Down, on June 22 by the Prime Minister of Northern Ireland, Captain Terence O'Neill.

Production will be mainly of synthetic hand and machine knitting yarns, principally Prismar, a 100 per cent Acrilan Atoz-processed yarn. The plant, however, can also spin wool and wool-synthetic blend yarns. Production capacity exceeds 2 million lbs. per year.

The new company has been created by Mr. B. H. McCleery and Mr. G. J. C. L'Amie. They designed and built the machinery which will Atoz-process the Acrilan fibre. McCleery and L'Amie are the first commercial spinners in the world licensed to use the Atoz process, though fibre producers may insert the Atoz property in the basic fibre.

The vertical organization of the McCleery and L'Amie plant enables it also to spin as required any man-made fibre, including Courtelle, Terylene, nylon and Spandex – an elastomeric fibre – all of which are made in Northern Ireland by Courtaulds, ICI, British Enkalon and Polythane Fibres Ltd.

£4m PVC expansion in South Wales

BRITISH GEON Limited, a company in Distillers Chemicals and Plastics Group, is to make a major extension to its factory for producing polyvinyl chloride (PVC) at Barry in South Wales. British Geon is owned jointly by D.C.L. and B. F. Goodrich Chemical Company of America. The factory manufactures vinyl chloride monomer which is then polymerized to produce PVC. Its present polymerization capacity, recently increased to 70,000 tons per annum, will now be increased to 90,000 tons by the first half of 1965. Plans for further increases are expected to be announced before the end of this year.

The construction of the new acetylene plant will begin shortly. It is expected to be in production during the first half of 1966. By the same time the existing monomer capacity will be raised to 130,000 tons, to allow for future increases in polymerization capacity. The total cost of the new plant, the extensions to monomer capacity and off-site services will be about £4 million.

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Applications for temporary exemption from import duty

THE BOARD OF TRADE are considering applications for the temporary exemption from import duty of the materials listed below on the grounds that these materials are not made in this country or the Commonwealth or the supply available from these sources is not substantial having regard to the existing United Kingdom demand.

Representations are invited from manufacturers in this country or agents of Commonwealth manufacturers who consider they are, or will be within a reasonable period, in a position to supply a substantial proportion of the United Kingdom demand for these materials, or who are interested in their future production.

Temporary exemptions come into effect on the operative date of the Treasury Order in which the materials are specified and normally continue until the end of the current calendar year, when they are reviewed.

Interested parties who wish to make representations should address them to Tariff Division, Board of Trade, 1, Victoria Street, London, S.W.1, preferably through a Trade Association, giving the respective reference shown below and stating whether their names may be passed to the applicants for temporary exemption. Representations should be received by July 17, 1964.

Tariff heading	Proposed definition for tariff purposes	Applied for as	Exemption required until	Reference
29.01	1:2:3:4 - Tetrahydro - 1:1:2:4:4:7 - hexamethylnaphthalene	1,2,3,4,4,6, - Hexamethyl - 1,2,3,4, - tetrahydronaphthalene.	December 31, 1964	6417
29.26	Di - (2:6 - di*iso*propylphenyl) carbodi - imine.	Tetra isopropyl - diphenylcarbodiimide.	December 31, 1964	6431
29.29	*N* - (Dimethylamino) succinamic acid.	N - Dimethylamino succinamic acid.	December 31, 1964	6488
38.19	Preparations, gaseous, containing not less than 0·002 by volume and not more than 1·5% by volume of selenium compounds calculated as hydrogen selenide, and selenide, and having a value not less than £15 per cubic metre at standard temperature and pressure.	Semiconductor doping gas.	December 31, 1964	6304
56.01	Man-made fibres (discontinuous) of copolymerised Vinylidene chloride and acrylonitrile with a modifier based on an acrylamide, not carded, combed or otherwise prepared for spinning.	Modacrylic fibre . .	December 31, 1964	7463

Note: The following application, published in the *Board of Trade Journal* dated June 5, 1964 (page 1219), should read:—

38.11	Preparations containing not less than 7% by weight of 2:6 - dichlorothiobenzamide and not more than 15% by weight of materials soluble in diethy ether.	Preparations, solid, containing not less than 7% by weight of 2:6 - dichlorothiobenzamide.	December 31, 1964	6365

Imports of some grass and clover seeds

IN Notice to Importers No. 1075 dated June 30, 1964 the Board of Trade announced that the arrangements whereby imports of certain clover and grass seeds are permitted under Open Individual Licences will continue on a similar basis for the twelve-month period commencing July 1, 1964. The existing licences were issued originally under the terms of Notice to Importers No. 940 dated June 2, 1960 (see *Board of Trade Journal* of June 3, 1960, page 1194), and their validity has been extended to cover each succeeding year. These licences will lapse on June 30, 1964, *and it will be necessary for all who wish to import such seeds after that date to submit new applications.*

Copies of Notice to Importers No. 1075 giving full details of these arrangements are obtainable from the Import Licensing Branch, Board of Trade, Hillgate House, 35 Old Bailey, London, E.C.4.

Imports of apples

IN Notice to Importers No. 1072 dated June 30, 1964 the Board of Trade announced that the quota for imports of fresh apples from the Relaxation and Dollar Areas and Japan for the period from July 1, 1964 to December 31, 1964 will remain unchanged at 304,000 cwts.

Applications can be considered from previous licence holders only. They should be made on form ILB/A (or TIP/A) and be sent to reach the Import Licensing Branch, Board of Trade, Hillgate House, 35 Old Bailey, London, E.C.4, not later than July 14, 1964. Page 1 of the application form should be completed and page 2 left blank; on page 3 and copies, *only* the applicant's name and address and description of goods (fresh apples) should be entered.

Imports of fresh pears

IN Notice to Importers No. 1073 dated June 30, 1964 the Board of Trade announced that the quota for imports of fresh pears from the Relaxation and Dollar Areas and Japan for the twelve months from July 1, 1964 to June 30, 1965, is being repeated at 560,000 cwts.

Applications can be considered from previous licence holders only. They should be made on form ILB/A (or TIP/A) and be sent to reach the Import Licensing Branch, Board of Trade, Hillgate House, 35 Old Bailey, London, E.C.4, not later than July 14, 1964. Page 1 of the application form should be completed and page 2 left blank; on page 3 and copies, *only* the applicant's name and address and description of goods (fresh pears) should be entered.

Drawback on imported key plates and hooks for key containers for export

THE BOARD OF TRADE give notice that they are considering an application for the allowance of drawback of duty on goods of the following descriptions:

Imported goods	Exported goods
Steel key plates, brassed and lacquered with sliding bar, and hooks and loops therefor.	Key containers.

Any interested party wishing to support or oppose this application should do so in writing to the Board of Trade, Tariff Division, 1 Victoria Street, London, S.W.1, not later than July 17, 1964.

Marking of imported electric incandescent lamps

THE BOARD OF TRADE announce that an Order in Council under section 2 of the Merchandise Marks Act 1926 was made on June 23, 1964 varying the manner in which the indication of origin is to be applied to certain imported electric incandescent lamps.

This Order (The Merchandise Marks (Imported Goods) No. 2 Order 1928 Amendment Order 1964) provides that, in the case of imported electric incandescent lamps of the following description, the indication of origin shall be indelibly marked on the carton, wrapper or container, and also either indelibly marked on the bulb or indelibly stamped, embossed, incised or impressed on the cap:

> Electric incandescent lamps the bulb of which is over 15 mm. and not over 35 mm. in diameter.

This Order in Council further amends the Merchandise Marks (Imported Goods) No. 2 Order 1928, Part III (S.R. & O. 1928 No. 570 and S.R. & O. 1931 No. 127). The Order comes into force on June 30, 1964.

Copies of the Order (S.I. 1964 No. 912) can be obtained from HM Stationery Office, Kingsway, London, W.C.2, and branches, or through any bookseller, price 3d., by post 5½d.

BRAND NEW BALL & ROLLER BEARINGS
OVER 5,000,000 IN STOCK IN MORE THAN 5,000 TYPES
THE WORLD'S LARGEST SELECTION OF
BRITISH, AMERICAN & CONTINENTAL BEARINGS IN ALL TYPES & SIZES
Immediate Delivery from Stock • Keenest Prices
EXPORTERS TO ALL PARTS OF THE WORLD
CLAUDE RYE BEARINGS
895-921 FULHAM ROAD, LONDON, S.W.6
RENOWN 6174 (EXT. 24)
Cables: RYBEARINGS, LONDON. TELEX 23453

Marking of imported umbrellas and imported umbrella parts

THE BOARD OF TRADE announce that Orders in Council were made on June 23, 1964 under section 2 of the Merchandise Marks Act 1926 as follows:

(a) *The Merchandise Marks (Imported Goods) No. 10 Order* 1933 *Amendment Order* 1964 (*S.I.* 1964 *No.* 913)

The principal changes are as follows:

(i) It is no longer necessary for imported frames, tubes and ribs of iron or steel wire forming part of a complete umbrella (whether imported or assembled in the United Kingdom) to bear a separate indication of origin so long as the umbrella itself is appropriately marked.

(ii) A wider range of methods of marking such imported parts is permitted.

The Order came into operation on June 23.

(b) *The Merchandise Marks (Imported Goods) Order* 1964 (*S.I.* 1964 *No.* 914)

The principal changes are as follows:

(i) Imported umbrellas and imported shafts are now required to bear an indication of origin.

(ii) Imported frames, tubes and ribs of whatever material they are made are now required to bear an indication of origin (not, as hitherto, only those made of iron or steel wire).

The Order comes into operation on February 1, 1965.

Copies of the Orders can be obtained from HM Stationery Office. Price 5d. each, by post 7½d. each.

Note:

The report of the Standing Committee (General Merchandise), set up under the Merchandise Marks Act 1926, recommending this action was published as Command Paper No. 2298 on March 6, 1964.

Purchase tax on drugs and medicines

THE Commissioners of Customs and Excise have made a Direction under Section 17(3) of the Purchase Tax Act 1963 entitled the Purchase Tax (No. 3) Direction 1964 which temporarily exempts further essential drugs and medicines from tax. The effect of the Direction, which came into operation on June 26, 1964 is to make the following additions and extensions to the Schedule to the Purchase Tax (No. 2) Order 1963.

The additions

To Head I of the Schedule

N-(Diethoxyphosphinyloxy) naphthalimide;
Niclosamide;

To Head III of the Schedule

Clofibrate, whether or not mixed with androsterone;
Desferrioxamine, and salts thereof;

The extensions

In Head II, the entry relating to 'Dihydroxyaluminium sodium carbonate . . .' is amended as follows:

'Dihydroxyaluminium sodium carbonate, whether or not mixed with calcium carbonate and polyhydroxyaluminium sodium carbonate complexes, whether or not mixed with one of the following substances, that is to say, calcium carbonate and magnesium trisilicate';

In Head III, in the entry relating to 'Dextropropoxyphene, and salts, thereof, . . .' after 'acetylsalicyclic acid' add 'paracetamol'.

In Head III, in the entry relating to 'Meprobamate, . . .' after 'acetylsalicyclic acid' add 'or with tridihexethyl chloride'.

PT exemption on some children's wear

THE Commissioners of Customs and Excise announced on June 26 that in view of difficulties arising in certain sections of the trade from the introduction on July 1, 1964, of the revised criteria for exemption for young children's dressing gowns, bath gowns and housecoats announced on June 12 (see *Board of Trade Journal* of June 19, 1964, page 1330), they have decided that the operation of the sleeve limits under items B.17 and G.16 of the schedule to Notice No. 78A may be deferred from July 1 to October 1, 1964.

Changes in export licensing control

THE BOARD OF TRADE announce certain changes in export licensing control to come into force on July 14, 1964. The changes are made by the Export of Goods (Control) (Amendment No. 2) Order 1964 which extends control on the export of armour plate and plant for the manufacture of military explosives to all destinations.

Copies of the Export of Goods (Control) (Amendment No. 2) Order 1964 can be obtained from H.M. Stationery Office, Kingsway, London, W.C.2, and branches. Inquiries about the Order should be made to the Board of Trade, Export Licensing Branch, Hillgate House, 35 Old Bailey, London, E.C.4. (Tel. City 5757).

Note: Under the main Order, the Export of Goods (Control) Order 1963, a licence is required for the export of these items to a limited range of destinations. The new Amendment Order extends the control to all destinations.

The Import Duties (Temporary Exemptions) (No. 6) Order 1964

THE TREASURY have made the Import Duties (Temporary Exemptions) (No. 6) Order 1964.

The First Schedule to the Order provides for the exemption from import duty from July 1, 1964 until January 1, 1965 (except where some other date is shown) of certain goods (mainly chemicals) at present liable to import duty.

The Second Schedule to the Order provides for the extension until January 1, 1965 (except where some other date is shown) of existing temporary exemptions from import duty of certain goods (mainly chemicals). These exemptions would otherwise have expired on July 1, 1964.

The Order came into operation on July 1, 1964 and has been published as Statutory Instrument 1964 No. 910.

Copies may be obtained from HM Stationery Office.

Import Duty Drawbacks (No. 5) Order 1964

THE TREASURY have made the Import Duty Drawbacks (No. 5) Order 1964.

This Order extends until July 31, 1965 the provision of drawback of import duty on imported creped paper used in the manufacture of exported adhesive tape.

The Order came into operation on July 1, 1964 and has been published as Statutory Instruments 1964 No. 908.

Copies are obtainable direct from HM Stationery Office.

The Import Duties (General) (No. 7) Order, 1964

THE TREASURY have made the Import Duties (General) (No. 7) Order, 1964, which reduces the United Kingdom import duty by 60 per cent with effect from July 1, 1964, on the following products when they are consigned from a place in the EFTA area and satisfy the EFTA origin rules:

ex 05.04 Edible guts, bladders and stomachs, whole and pieces thereof, of bovine animals, other than sausage casings.
ex 08.09 Melons.
ex 12.03 Seeds of coniferous species.

These duty reductions are the result of a recent agreement in EFTA to transfer several products from Annex D (the list of agricultural items which fall outside the scope of the EFTA duty reductions) into the industrial sector, where they will be subject to duty reductions in accordance with the EFTA duty reduction timetable, under which EFTA duties will be eliminated on December 31, 1966.

This Order came into operation on July 1. Copies of the Order (S.I. 1964/909) are obtainable direct from H.M. Stationery Office.

PHOTOGRAPHS FOR THE JOURNAL

The Editor will be glad to consider prints of industrial photographs suitable for publication in the Board of Trade Journal.

Black and white prints. *These should be 'action' photographs showing U.K. goods being inspected by overseas buyers or in process of being packed or shipped for export or being unloaded, installed or in use at the overseas destination.*

Photographs of U.K. businessmen in discussion with overseas buyers and of visitors at exhibition stands overseas are also acceptable.

Colour photographs. *Four-colour illustrations with an export angle and for which blocks are available will be considered for use as coloured cover illustrations.*

Parliamentary Answers

Below is a selection of Parliamentary answers of interest to trade and industry

THURSDAY, JUNE 18

N. E. expansion

Mr. Edward Heath, Secretary of State for Industry, Trade and Regional Development, made the following statement on his recent visit to the North-east and what further plans he had for the introduction of new industries and expansion of existing industries in the area. 'In the course of my tour, I saw much evidence of the substantial development already under way in the area. Jobs in prospect now number nearly 32,000, compared with less than 18,000 a year ago. In terms of IDC's: 96 were issued in the first five months of this year, involving some 12,000 jobs. Comparative figures for last year were 44 and 2,400. I am confident that the development of the Government's existing policies for the area will continue to lead to the introduction of new industries and expansion of existing ones. Already IDC's issued this month exceed, in number and prospective employment, the total of IDC's issued for the whole of June last year.'

Amounts approved under LEA

Asked what amounts had been approved under the Local Employment Acts 1960 and 1963 up to the latest convenient date in England, Scotland, and Wales, respectively; and what were his estimates of the jobs likely to be provided, the Secretary of State said that the total amounts approved and offered by way of loans, grants and factory building under the Local Employment Acts 1960 and 1963 up to the end of May 1964 (excluding offers declined) were £44 million in England, £57 million in Scotland and £8 million in Wales. It was estimated that the projects assisted would provide 72,800 additional jobs in England, 54,100 in Scotland and 10,000 in Wales.

Regional development in Yorkshire

Asked what steps were being taken to co-ordinate the activities of his group studying Regional Development in Yorkshire with the Boundary Commissioners who had recently issued a special report on the West Riding, Mr. Edward du Cann, Minister of State, Board of Trade, said: 'No question of co-ordination arises. The work of the Local Government Commission on the West Yorkshire Special Review was completed when their report and final proposals were published last February. The Group now working in Leeds will certainly study that report.'

Pulp and paper mill loan

In reply to a questioner who asked what amount was now being advanced by the Government on loan and on remittance of interest on the loan, respectively, in respect of the pulp and paper mill project at Fort William, the Secretary of State said the total sum to be advanced in respect of the first phase of the project was expected to be £8 million. Grants in respect of interest were expected to amount to some £1,200,000. If the firm decided to proceed with the second phase of the project the Government were prepared to consider advancing a further sum not exceeding £2 million if the need for this was established.

Industry in Lanarkshire

Asked when building work would start on the new industrial estate for North Lanarkshire; when the first factory would be ready for occupation; and what estimate he had now made of the number of jobs to be provided within the foreseeable future, the Secretary of State said: 'As a result of revised development plans on the part of the Lanarkshire County Council affecting the area as a whole, unexpected difficulties have arisen in relation to the proposals made by the Industrial Estates Management Corporation for Scotland. The Office for Scotland and the Management Corporation are discussing these difficulties with the County Council and with the Scottish Development Department, but until they are resolved, development of the industrial estate cannot proceed.'

Industrial development

The Secretary of State was asked how many industrial development certificates were issued during the year ended March 31, for Scotland, London and South-east England, and the Midlands of England, respectively; and how many jobs they provided. In reply he said that for Scotland 177 industrial development certificates were issued with an estimated employment of over 14,000. For London and South-east England (consisting of the standard regions Eastern, London and South Eastern and Southern) the comparable figures were 725 certificates to employ 20,470. For the Midlands (consisting of the Midland standard region and the North Midland Region, including Lincolnshire) 429 certificates to employ just under 7,800.

The film quota

Asked if he would raise the film quota to 40 per cent for the forthcoming year, the Secretary of State replied: 'No Sir. I have decided to accept the advice of the Cinematograph Films Council to maintain the prescribed quotas at 30 per cent for first feature films and 25 per cent for the supporting programme for the exhibitors' quota year beginning January 1, 1965.

'45 per cent of the first feature films shown by the two major circuit companies in 1963 were British. Both these companies announced at the end of last year that they were reasonably confident that this would be the case in 1964. They have now informed me that on the assumption that British films continue to be available in sufficient numbers and quality, they expect this position to continue in 1965.'

Import duty on computers

In answer to a question on the current level of import duty charged on computers entering this country from the United States; when this rate was introduced; and what was the previous level, the Secretary of State said that the duty was 14 per cent *ad valorem*. It was reduced from 17½ per cent *ad valorem* in October 1962 as a result of GATT tariff negotiations.

Monopolies Commission Report on electrical equipment for vehicles

Asked what decision H.M. Government had now reached on the recommendations of the Monopolies Commission in its Report of February 1963 on the supply of electrical equipment for mechanically propelled land vehicles, the Secretary of State replied that two of the three outstanding recommendations were covered by the legislation on resale price maintenance and the Government's proposals in the White Paper on monopolies, mergers and restrictive practices, and that he was in touch with the British Starter Battery Association to ascertain their intentions in the light of the Monopolies Commission recommendation and the proposals in the White Paper.

Nuclear power stations for Rumania

In answer to several questions on the possibility of removing the embargo on the sale of British nuclear power stations to Rumania, the Secretary of State said that in principle he favoured seeking to modify the embargo so as to permit individual reactors to be exported, subject to the proper safeguards. Discussions with the United States Government on this matter were proceeding. We should, of course, have to consult the other countries concerned as well.

Anglo-Soviet Trade Agreement

Asked for details of the protocol signed on April 23, for the prolongation of the 1959 Anglo-Soviet Trade Agreement for a further period of five years, and the commodities to which it relates; and if he would make a statement on the effects on British imports from and exports to Russia the agreement has had from 1959 up to the most recent convenient date, with particular reference to trade with Scotland; the Secretary of State answered that the protocol extended without change the 1959 Anglo-Soviet Trade Agreement which provided a general framework within which all Anglo-Soviet trade takes place. It was proposed to publish the text of the protocol as a White Paper. Between 1959 and 1963 United Kingdom imports from Russia increased by 44 per cent and exports to Russia by 102 per cent. Many Scottish firms shared in this trade.

Artificial silk goods from Hong Kong

In reply to a question asking what consideration had been given to allowing artificial silk goods manufactured in Hong Kong, of which the artificial fibre content was produced in this country, to be imported into the United Kingdom under duty-free Commonwealth preference, the Minister of State said that the Secretary of State had considered this possibility very fully in relation to imports from the Commonwealth preference area as a whole, and he had concluded that the objections were over-riding.

Trade with the Commonwealth and EEC

Asked what was the proportion of British exports and imports, respectively, with Commonwealth countries and with the European Economic Community in 1958 compared with 1963, the Minister of State replied that in 1958 and 1963, 35 per cent and 32 per cent of our imports came from the Commonwealth, and 14 per cent and 16 per cent from the EEC. The equivalent proportions for total exports were 38 per cent and 29 per cent to the Commonwealth and 14 per cent and 21 per cent to the EEC.

New Books

Restrictive Business Practices, Comparative Summary of Legislations in Europe and North America. Organisation for Economic Co-operation and Development (134 pages. Will be available at 6s., by post 6s. 11d., from HM Stationery Office and Government Bookshops). A striking development in the field of business law since the war has been the spread to a constantly increasing number of countries, of legislation designed to eliminate or control certain restrictive business practices. The widespread interest in this subject has led the Organization for Economic Co-operation and Development to set up a Committee of Experts (carrying on the work done for the former European Productivity Agency since 1953) to study the problems raised by the existence of restrictive practices; and, where appropriate, to make recommendations to member countries on means of minimizing the harmful effects of such practices. As one of its first tasks the Committee has tackled the problem of collecting and publishing the texts of the legislation on restrictive business practices in the countries of Europe and North America, both for its own use and for the use of research workers, businessmen, lawyers and others. The first fruit of this task was the *Guide to Legislation on Restrictive Business Practices*, which started to appear in 1960, and which is now constituted in five loose-leaf volumes, to which supplements are published about four times a year. This *Guide* comprises sections devoted to individual countries, in each of which are to be found the texts of the laws and regulations in force, a brief commentary on the law, notes on judicial and administrative decisions, and a bibliography. It thus provides a comprehensive survey of the legislation in force in 16 OECD countries (including Canada and the United States), the European Coal and Steel Community and the European Economic Community. The *Comparative Summary* now published is designed as a practical aid to using the *Guide*, and also to facilitate comparison of the differing attitudes adopted by OECD member countries and international organizations. It consists of 17 tables, each devoted to a single point of restrictive business practice law, such as horizontal price fixing, export cartels, price discrimination, exclusive dealing, or the system of notification and registration. In each table are ranged brief summaries of the legal position in each of the countries dealt with, together with references to the relevant legislative enactments and court decisions, and to the place in the *Guide* where a full treatment will be found. In this way it summarizes the law of Great Britain, Canada, the United States, ten other Western European countries the European Coal and Steel Community and the European Economic Community.

La Distribution des Marchandises en Belgique, by Marcel Michel (208 pages. Institut de Recherches Economiques, Sociales et Politiques, Louvain, Belgium. 230 Belgian francs). This study in French of the distributive industry in Belgium endeavours to present a comprehensive and up-to-date picture of a side of the enonomy often ignored in formal economic studies of that country. The results of the official 1961 Census were not available at time of writing, but for his many tables the author has included statistics from numerous other, acknowledged, sources. The book surveys the industry in relation to the whole national economy and discusses the contribution made by firms both large and small. The number of persons employed, the salaries paid and the different types and sizes of enterprises are all analyzed and related to the various regions of the country. The author details sales made by co-operatives, voluntary chains, supermarkets, department stores, etc., and compares results for named companies within these groups. The book concludes with a section setting out a number of the official regulations governing the industry. These cover company formation, government financial assistance and loans, price fixing and sales regulations of various types. The book includes a bibliography.

West African Marketing Vade Mecum, by Hugh H. Auger (48 pages. Institute of Practitioners in Advertising, 15s., by post 16s. 6d.) is a short little book which aims to help the person who cannot make a personal visit to West Africa as well as to add to the stock of knowledge on West African marketing conditions already available to the business man. A general survey of prospects in West Africa is followed by separate notes on Sierra Leone, Nigeria, Ghana, Senegal, Gambia, Ivory Coast, Cameroon, Liberia and Guinea, giving information on the geography, population, climate, and advertising media, and a small map of chief towns, railways and rivers. Deliberately few statistics are included. A selection of photographs at the end of the book illustrates some of the advertising methods used by firms already operating in West Africa.

Manual of Foreign Investment in Japan (26 pages. Free from the Foreign Capital Research Society, c/o The Bank of Japan, Tokyo) is a brief guide and explanation of the main stipulations of the Japanese law relating to foreign exchange and trade control. It includes some statistical tables of recent trends in foreign investment in Japan. The pamphlet is dated March 1964, but comes with an amendment sheet notifying some important changes which took place in April this year.

The French Market (31 pages. 10s. 6d., from Marketing Department, Gee Advertising Ltd., 23, Great Castle Street, London, W.1.). A conversationally written 'introduction for British exporters', which briefly sketches some characteristic aspects of trading with France, and seeks to persuade the 'unconvinced' business man of the opportunities available to him there. It also gives some elementary advice on prospecting the markets in France.

Statistical Bulletin for Latin America. United Nations Economic Commission for Latin America (twice a year). The statistical data collected by the UN Economic Commission for Latin America have always been of particular importance as a reliable source of economic and commercial information on a large group of countries in which governmental statistics and other national economic publications are sometimes not available at all, and frequently hard to find or at best erratic in appearance. These international statistical data have for the most part been published hitherto in supplements and appendices to the Commission's *Economic Bulletin for Latin America*. This new periodical both replaces the supplements and appendices and also provides revised presentation and expanded coverage. Volume 1, Number 1, of the *Statistical Bulletin* is dated March 1964. It contains data received by the Commission up to the end of February 1964, and the main change in presentation from the earlier statistics is that all the tables are fully bilingual (Spanish and English). This issue introduces a new series of tables on the international trade of the Latin American countries, most of the information in them being unobtainable from any other source. The other subjects covered are Population, National Accounts, Production, Finance and Prices. There are also introductory tables of selected economic indicators for Latin America as a whole. Copies: this issue 22s. 6d., by post 23s. 10d., from HM Stationery Office and Government bookshops (not available on subscription, but standing orders may be placed).

Further Education for Technicians (36 pages. 5s. 6d., from the City and Guilds of London Institute, 76 Portland Place, London, W.1). This monograph is concerned with the purposes and characteristics of part-time courses of further education for young people in industry, who are aiming at employment as technicians. Some difficulty arises in attempting to define the characteristics of a technician and also which occupations fall into this category. Nevertheless, the overall pattern of technician's courses is described with a more detailed examination of some representative courses. This is the last monograph on the series produced by the City and Guilds Institute to inform and help those who may be affected by the rising demand for technical education.

Other publications

ADVERTISING AND PRESS ANNUAL, 1964. 390 pages. National Publishing Company (Africa) Ltd., Capetown; Africa and Overseas Press Agency, 13 New Bridge Street, London, E.C.4. 70s.

FRUIT: A REVIEW OF PRODUCTION AND TRADE. By the Commonwealth Economic Committee. 232 pages. HM Stationery Office and Government Bookshops. 10s., by post 10s. 10d.

SUGAR YEAR BOOK, 1963. 298 pages. The International Sugar Council, 28 Haymarket, London, S.W.1.

TRADE DIRECTORY OF THE REPUBLIC OF THE SUDAN, 1964. 140 pages. Diplomatic Press & Publishing Co. 40s.

WHO MAKES MACHINERY, 1964. 1,300 pages. Hoppenstedt Wirtschaftsverlag, Darmstadt. Copies 18s. from Interbook Ltd., 12 Fitzroy Street, London, W.1. (Directory in English for buyers of German machinery and apparatus, precision tools, machine parts and accessories.)

YORKSHIRE TEXTILE INDUSTRY, 1964. 584 pages. John Worrall Ltd., Oldham. 30s., by post 32s. 6d.

A LIBRARY FOR EXPORTERS

Foreign trade statistics and other economic statistics from almost every country in the world are freely available for reference in the Board of Trade Statistics and Market Intelligence Library at Hillgate House, 35 Old Bailey, London, E.C.4. This is a modern well-equipped library of over 85,000 volumes. It has a reading-room for visitors, and provides a document-copying service. There are trade directories covering 150 countries, and an expanding collection of trade catalogues of foreign manufacturers.

The library opens from 9 to 5.30, Mondays to Fridays. Tel. City 5757, Ext. 368, or Telex No. 25977.

The Register of Restrictive Trading Agreements

Additions and amendments to the Register

A LIST OF ADDITIONS and amendments made to the alphabetical index to the register between April 1 and June 30, 1964, is given below; the amendments are shown in italics.

'D' and 'F' Agreements

Also given below, headed 'D' and 'F' Agreements, is a schedule which brings up to date at June 30, 1964, particulars of those agreements which have been determined or varied.

A full explanation of the basis on which these two lists have been compiled, and the meaning of the symbols used, was published in the *Board of Trade Journal* (page 9) on January 3, 1964.

Agreements referred to the Restrictive Practices Court

The undermentioned list, headed 'Agreements referred to the Restrictive Practices Court', gives details of additional agreements in respect of which Notices of Reference have been issued, thus constituting formal commencement of proceedings before the Restrictive Practices Court, as explained in the introductory paragraph to the lists published in the *Board of Trade Journal* (page 9) on January 3, 1964. Anyone who may be in a position to assist the Court with evidence from his own experience of results of any of these agreements which he thinks affect the public interest is asked to communicate as early as possible with the Treasury Solicitor's Branch, Office of the Registrar of Restrictive Trading Agreements, Chancery House, Chancery Lane, London, W.C.2.

Inspection of the Register

The register may be inspected at a fee of 1s. per day, between 10 a.m. and 4.30 p.m., on any weekday except Saturday and certain holidays at any of the following addresses:—

Office of the Registrar of Restrictive Trading Agreements, Chancery House, Chancery Lane, London, W.C.2. 9, Wemyss Place, Edinburgh, 3. Chichester House, 64, Chichester Street, Belfast.

The indexes to the register, one as published in the *Board of Trade Journal* and one in which commodities are grouped by classes, may be inspected at these addresses free of charge.

'D' and 'F' Agreements

Registered No. of Agreement	Commodity	Area	D or F	Date
136	Metal spraying	—	F	Dec. 1963
207	Iron castings	—	F	Apr. 1964
231	Seeds, sugar-beet	—	F	Apr. 1957
366	Ladies' and children's clothing	—	F	May 1963
388	Rock bits	—	D	Jan. 1964
405	Locomotives, diesel electric, gas turbine electric	—	D	Mar. 1964
408	Bright bolts and nuts, set pins, studs	—	F	May 1964
652	Ladies' and children's light clothing	—	D	Jan. 1962
735	Light clothing	—	F	Jan. 1962
790	Gas coke	—	D	May 1964
913	Ferrous scrap	—	F	Apr. 1964
1149	Paper and paperboard	—	F	Oct. 1963
1223	Harris tweed, woollen yarn	—	F	Mar. 1964
1493	Diesel alternator sets	—	D	June 1963
1577	Nursery stocks, seeds for planting (Flower and vegetable) sugar-beet seeds	—	F	Feb. 1964
2510	Hops	—	F	May 1964
2619	Consumer goods	Scotland	F	Mar. 1964
2702	Coal, coke	Ramsgate	D	May, 1964
2760	Woollen fabric (Harris tweed)	—	F	Mar. 1964
2789	Bicycles, Motor cycles, Motor cycle spare parts, side cars	—	D	Feb. 1964

Agreements referred to the Restrictive Practices Court

Registered No. of Agreement	Commodity
951	Concrete pipes.
2797	Cooking and heating appliances.
124	Fruit, flowers and vegetables.
2796	Heat treated bolts.
2801	Iron and steel forgings.
2802	Iron and steel forgings.
2803	Iron and steel forgings.
2798	Iron castings.
2799	Iron castings.
729	Linoleum
1575	Monumental goods.
547	Neckties.
2816	Surgical footwear.
1072	Wire netting.

Additions and Amendments to the Register

Registered No. of Agreement	Commodity
	A
2929	Aerobic digester units and parts (plant for the treatment of sewage), N. Ireland and Eire
	B
2830	Bacon pigs,E. 4/63.
2899	Bacon pigs, E. 4/64.
2877	Beer.
2457	Bicycles, C. 11/61, E. 8/59, *add C.*1/64.
2789	Bicycles, *add D.*2/64.
408	Bright bolts and nuts, *add F.*5/64.
1421	Building materials, Dundee and district, F.7/63, *add C.*3/64.
1423	Building materials, Dundee and district, F.8/63, *add C.*3/64.
	C
2924	Camping goods, (Trading stamps)
2702	Coal, coke, Ramsgate, *add D.*5/64.
2905	Coal and solid fuels.
2906	Coal and solid fuels.
2097	Coal and solid fuels.
2619	Consumer goods, Scotland, *add F.*3/64.
2915	Cork carpet and tiling.
	D
2893	Diesel alternators.
1493	Diesel alternator sets, *add D.*6/63.
	F
913	Ferrous scrap, *add F.*4/64.
2652	Floor tiles, *add C.*1/64.
2626	Fruit and produce, Liverpool and district, *add E.* 1/65.
	G
790	Gas coke, D.5/64.
2652	Glazed fireplace tiles, *add C.*1/64.
2652	Glazed wall tiles, *add C.*1/64.
	H
2855	Hardwood sawn mining timber, England and Wales, E.12/63.
2884	Hardwood sawn mining timber, England only, E.9/64.
1223	Harris tweed, *add F.*3/64.
2510	Hops, *add F.*5/64.
	I
621	Indian Webbing, D.4/63, *add C.*3/64.
207	Iron castings, *add* F.4/64.
	J
1345	Jute carpets, D.4/63, *add C.*3/64.
	L
366	Ladies' and children's clothing, *add F.*5/63.
652	Ladies' and children's light clothing, *add D.*1/62.
735	Light clothing, *add F.*1/62.
2915	Linoleum and similar products.
405	Locomotives, diesel electric, *add D.*3/64.
405	Locomotives, electric, *add D.*3/64.
405	Locomotives, gas turbine electric, *add D.*3/64.
	M
2811	Meat, Glasgow, *add C.*3/64.
136	Metal spraying, *add F.*12/63.
2213	Milk, F.1/63, *add C.*3/63.
2919	Milk, Devizes and district.
2652	Mosaic and bathroom accessories *add C.*1/64.
2457	Motor cycles, C.11/61, E.8/59, *add C.*1/64.
2789	Motor cycles, *add D.*2/64.
2457	Motor cycle spare parts, C.11/61, E.8/59, *add C.*1/64.
2789	Motor cycle spare parts, *add D.*2/64.
	N
2914	Newspapers, (Sunday).
1577	Nursery stocks, *add F.*2/64.
	P
1149	Paper and paperboard, *add F.*10/63.
2682	Pigskins, Scotland, *F.*11/63, *add C.*3/64.
1586	Printed books, *add C.*2/64.
2915	PVC based materials.
	R
388	Rock bits, *add D.*1/64.
2925	Rock bits.
2915	Rubber flooring.
	S
408	Set pins, studs, *add F.*5/64.
1577	Seeds for planting (flower and vegetable), *add F.* 2/64.
231	Seeds, sugar-beet, *add F.*4/57.
2457	Sidecars, C.11/61, E.8/59, *add C.*1/64.
2789	Sidecars, *add D.*2/64.
2877	Spirits.
1577	Sugar-beet seed, *add* F.2/64.
	T
2915	Thermoplastic tiles.
2652	Tiled fireplaces, *add C.*1/64.
2934	Toys.
2898	Trading stamps (Intoxicating beverages).
	V
879	Vegetable parchment paper, *add E.*12/61.
	W
2877	Wines.
2760	Woollen fabrics, (Harris tweed), *add F.*3/64.
1223	Woollen yarn, *add F.*3/64.

Statistics

The economy: selected indicators

Series expressed as index numbers and seasonally adjusted except where otherwise shown

	GROSS DOMESTIC PRODUCT (expenditure estimates)	INDEX OF INDUSTRIAL PRODUCTION	CONSUMERS' INCOME AND EXPENDITURE				FIXED CAPITAL EXPENDITURE					CHANGES IN STOCKS			
			Personal disposable income	Total consumers' expenditure		Retail sales	Total	Selected components: Manufacturing industry	Distributive and service industries	Dwellings	Public sector excluding dwellings	Total	Selected components: Manufacturing industry	Wholesalers	Retailers
	at 1958 prices		at current prices		at 1958 prices	at 1961 prices	at 1958 prices					at 1958 prices			
Base of index	1958	1958	1958	1958	1958	1961	1958	1958	1958	1958	1958	series shown in £ million			
Value in base year, £m.	19,957	—	16,034	15,212	15,212	9,095	3,486	922	699	591	1,205				
1959	103	105	106	105	104	95	108	94	114	113	109	+174	+ 73	+15	+49
1960	108	112	114	110	108	98	118	110	125	129	114	+592	+520	+48	+37
1961	112	114	122	115	111	100	129	130	133	137	121	+297	+230	+36	+ 4
1962	112	115	126	122	112	101	127	119	126	140	124	+113	+ 33	+22	+49
1963	116	119	134	128	117	103	129	107	131	144	132	+135	+ 89	+15	+27
1962															
3rd quarter	112	116	127	122	113	101	128	116	130	146	123	+ 57	+ 15	+23	+19
4th quarter	113	115	130	124	114	101	125	111	124	137	124	+ 10	— 9	+ 9	+25
1963															
1st quarter	112	113	129	124	113	101	115	104	124	101	118	— 20	+ 56	—16	— 3
2nd quarter	116	118	131	127	116	102	129	109	129	149	129	+ 42	— 9	+22	— 3
3rd quarter	116	120	136	130	119	105	134	106	130	159	138	— 34	— 33	—19	— 8
4th quarter	122	124	138	131	119	105	139	109	140	166	144	+147	+ 75	+28	+41
1964															
1st quarter		126*				106		114*	149*				+ 95*	— 4*	+ 3
1963															
November	..	124	..	..	..	104	..	..	..	..	..	..	..	..	..
December	..	125	..	..	..	106	..	..	..	..	..	..	..	..	..
1964															
January	..	126	..	..	..	107	..	..	..	..	..	..	..	..	..
February	..	126	..	..	..	105	..	..	..	..	..	..	..	..	..
March	..	126*	..	..	..	105	..	..	..	..	..	..	..	..	..
April	..	126*	..	..	..	106	..	..	..	..	..	..	..	..	..

	ORDERS		PRICES AND COSTS					LABOUR						IMPORTS	EXPORTS	BALANCE OF PAYMENTS: current balance
	Engineering industries: orders on hand†	Textiles and clothing industries: orders on hand†	Index of retail prices: Index†	Index of retail prices: % change on year earlier	Wholesale price index: non-food manufacturing industry: Basic materials and fuel used†	Wholesale price index: non-food manufacturing industry: Manufactured products: home sales†	Hourly wage rates: all industries and workers†	Wholly unemployed excluding school leavers: Mid-month or monthly average†	Wholly unemployed excluding school leavers: Change from previous period†	Wholly unemployed excluding school leavers: Normal seasonal change	Unfilled vacancies for adults: Mid-month or monthly average†	Unfilled vacancies for adults: Change from previous period†	Unfilled vacancies for adults: Normal seasonal change	at current prices		
	at 1958 prices															
Base of index	Dec. 1958	Apr. 1959	Jan. 17, 1956 (Derived series from January 1963)		1954	1954	Jan. 31, 1956	series shown in thousands						1958	1958	series shown in £ million
Value in base year, £m.	..	..	—		—	—	—							3,748	3,176	
1959	101	135	109·6	+0·6	103·4	114·2	117·4	433	+ 31	..	157	+21	..	106	105	+140
1960	117	136	110·7	+1·0	104·5	116·0	122·5	337	— 96	..	212	+55	..	121	112	—258
1961	120	104	114·5	+3·4	104·4	119·1	130·3	305	— 32	..	213	+ 1	..	117	116	— 10
1962	115	100	119·3	+4·2	103·0	120·6	136·2	419	+114	..	149	—64	..	120	119	+102
1963	135	118*	121·7	+2·0	104·5	122·0	141·3	502	+ 83	..	144	— 5	..	129	128	+121
1962																
3rd quarter	119	92	119·7	+3·8	102·2	120·8	137·3	390	+ 3	—34	156	—16	+ 7	123	121	— 18
4th quarter	115	100	119·6	+2·6	102·5	121·1	138·3	491	+101	+49	120	—36	—32	120	120	+ 40
1963																
1st quarter	117	100	121·4	+3·1	103·6	121·4	139·4	627	+136	+42	113	— 7	— 5	120	123	+ 71
2nd quarter	123	105	122·1	+1·6	104·2	121·8	140·9	504	—123	—58	147	+34	+33	127	127	+ 30
3rd quarter	130	100	121·3	+1·3	104·2	122·1	141·5	428	— 76	—34	157	+10	+ 6	132	131	+ 14
4th quarter	135	118*	122·1	+2·1	106·1	122·6	143·3	450	+ 22	+50	157	Nil	—34	135	132	+ 6
1964																
1st quarter	140*	121*	123·2	+1·5	108·0*	123·9*	145·8	445	— 5	+42	182	+25	— 5	145	134	— 62
2nd quarter								355*	— 90*	—58	230*	+48*	+33			
1963																
November	133	120*	122·2	+2·2	106·5	122·5	143·1	456	+ 8	+19	157	— 3	—16	135	129	..
December	135	118*	122·4	+1·8	106·8	122·9	145·1	447	— 9	— 1	155	— 2	—11	142	137	..
1964																
January	136*	119*	123·0	+1·9	107·5	123·7	145·4	471	+ 24	+41	166	+11	— 1	146	123	..
February	137*	121*	123·1	+1·2	108·2	123·9	145·7	451	— 20	+ 2	178	+12	+ 6	144	139	..
March	140*	121*	123·6	+1·5	108·3*	124·1*	146·2	413	— 38	—19	202	+24	+10	145	141	..
April	146*	123*	124·7	+2·0	108·2*	124·3*	146·7	394	— 19	—20	212	+10	+14	146	127	..
May			125·7	+2·9	107·7*	124·4*	147·0	357	— 37	—23	227	+15	+ 9	144	140	
June								315*	— 42*	—33	251*	+24*	+13			

† NOT seasonally adjusted. * Provisional.

Continued increase of UK trade by air

THE FIGURES of trade by air for 1963 (table 1) show a further increase compared with 1962; imports rose by 14 per cent, exports by 18 per cent and re-exports by 11 per cent. These increases were relatively greater than the growth in total trade by all forms of transport.

Non-electric machinery remained the most important category of goods exported by air, though the recorded value was less in 1963 than 1962. The fall here was more than offset by a substantial increase in the value of transport equipment exported by air.

The country details in tables 5 and 6 show that 48 per cent of our total trade by air was with Western Europe, 25 per cent with North America and 14 per cent with the Sterling Area. Important individual countries were France, United States, Switzerland, West Germany and Italy.

Statistical note:

The order and grouping of the commodity headings in these tables has been revised for 1963 in accordance with the Standard International Trade Classification, *Revised*. Figures under the commodity headings for earlier years have been revised so far as is possible to accord with this revised classification but in some cases comparability is approximate.

Complete aircraft flown out under their own power are included in the totals of all United Kingdom trade but are excluded from the figures of trade by air.

Table 1. Value of trade compared with total trade figures

Year	Imports			UK Exports			Re-exports		
	Total	By air		Total	By air		Total	By air	
	£m. c.i.f.	£m. c.i.f.	Per cent of Total Imports	£m. f.o.b.	£m. f.o.b.	Per cent of Total UK Exports	£m. f.o.b.	£m. f.o.b.	Per cent of Total Re-exports
1958	3,747·5	99·0	2·6	3,176·2	103·7	3·3	141·2	27·6	19·5
1959	3,983·4	137·4	3·4	3,330·1	142·9	4·3	130·9	24·5	18·7
1960	4,540·7	176·1	3·9	3,554·8	177·7	5·0	141·2	29·0	20·5
1961	4,395·1	202·9	4·6	3,681·5	219·7	6·0	158·6	30·1	19·0
1962	4,487·2	226·5	5·0	3,791·1	235·0	6·2	157·6	41·1	26·1
1963	4,820·2	258·6	5·4	4,080·1	278·4	6·8	153·8	45·6	29·6

Table 2. Commodity composition of United Kingdom exports

Selected divisions	1962			1963		
	Total UK Exports	UK exports by air		Total UK Exports	UK exports by air	
	£m. f.o.b.	£m. f.o.b.	Per cent of Total Exports	£m. f.o.b.	£m. f.o.b.	Per cent of Total Exports
00. *Live animals (excluding zoo animals, dogs and cats)	16·9	3·6	21	21·0	5·4	26
21. Hides, skins and fur skins undressed	5·0	0·6	11	4·3	0·5	11
51. Chemical elements and compounds	82·9	1·4	2	92·6	2·6	3
54. Medicinal and pharmaceutical products	56·1	10·0	18	53·9	10·0	19
61. Leather and leather manufactures and dressed furs	23·9	4·4	18	28·0	7·0	25
62. Rubber manufactures	47·3	0·9	2	49·4	1·0	2
65. Textile yarn, fabrics, made-up articles	245·0	10·7	4	254·1	12·4	5
68. Non-ferrous metals	131·6	10·3	8	124·5	17·1	14
69. Manufactures of metal	137·6	3·0	2	132·6	3·9	3
71. Machinery other than electric	799·7	63·1	8	858·6	57·2	7
72. Electrical machinery, apparatus and appliances	286·9	30·1	10	318·1	32·4	10
EX 73. Railway vehicles, road vehicles and parts, aircraft parts, ships and boats	555·5	24·4	4	609·8	40·3	7
84. Clothing	34·7	10·2	29	39·5	12·1	31
86. Professional, scientific and controlling instruments, photographic and optical goods, watches and clocks	63·0	17·5	28	75·3	22·6	30
89. Miscellaneous manufactured articles	120·7	21·7	18	129·7	26·5	20
All other goods	1,184·3	23·2	2	1,288·6	27·4	2
Total	3,791·1	235·0	6	4,080·1	278·4	7

*Figures shown under this heading include horses exported temporarily for racing, breeding or other purposes.

Table 3. Commodity composition of imports

Selected divisions	1962			1963		
	Total imports	Imports by air		Total imports	Imports by air	
	£m. c.i.f.	£m. c.i.f.	Per cent of total imports	£m. c.i.f.	£m. c.i.f.	Per cent of total imports
00. *Live animals (excluding zoo animals, dogs and cats)	46·3	3·8	8	50·5	4·6	9
21. Hides, skins and fur skins undressed	46·4	10·8	23	58·8	16·7	28
28. Metalliferous ores and metal scrap	138·9	6·3	5	143·5	4·7	3
51. Chemical elements and compounds	66·0	4·9	7	76·9	5·8	8
54. Medicinal and pharmaceutical products	5·4	1·9	36	6·3	2·3	37
61. Leather, leather manufactures and dressed fur skins	24·8	3·0	12	26·7	3·2	12
65. Textile yarn, fabrics, made-up articles	135·0	19·8	15	144·8	19·7	14
68. Non-ferrous metals	241·2	2·0	1	234·4	3·7	2
69. Manufactures of metal	30·4	3·3	11	31·4	3·5	11
71. Machinery other than electric	244·8	52·9	22	253·8	49·9	20
72. Electrical machinery, apparatus and appliances	80·2	32·2	40	92·6	37·3	40
EX 73. Railway vehicles, road vehicles and parts, aircraft parts, ships and boats	64·6	9·6	15	55·2	11·7	21
84. Clothing	53·8	16·4	31	64·6	18·0	28
85. Footwear	17·6	4·9	28	19·6	4·7	24
86. Professional, scientific and controlling instruments, photographic and optical goods, watches and clocks	44·7	19·1	43	54·0	24.2	45
89. Miscellaneous manufactured articles	77·3	24·1	31	91·9	27·9	30
All other goods	3,169·9	11·3	0	3,415·1	20·6	1
Total	4,487·2	226·5	5	4,820·2	258·6	5

*Figures shown under this heading include horses imported temporarily for racing, breeding or other purposes.

Table 4. Commodity composition of re-exports

Selected divisions	1962			1963		
	Total re-exports	Re-exports by air		Total re-exports	Re-exports by air	
	£m. f.o.b.	£m. f.o.b.	Per cent of total re-exports	£m. f.o.b.	£m. f.o.b.	Per cent of total re-exports
21. Hides, skins and fur skins undressed	27·6	12·8	46	31·5	14·2	45
61. Leather, leather manufactures, and dressed furs	2·8	1·2	42	3·5	1·8	51
68. Non-ferrous metals	15·4	2·9	19	12·0	2·4	20
71. Machinery other than electric	17·4	11·1	64	18·6	11·3	61
72. Electrical machinery, apparatus and appliances	6·5	4·4	68	8·1	4·8	59
73. Railway vehicles, road vehicles and parts, aircraft parts, ships and boats	2·9	2·0	68	4·0	2·5	62
89. Miscellaneous manufactured articles	5·1	3·5	68	7·0	5·0	71
All other goods	79·9	3·2	4	69·0	3·8	5
Total	157·6	41·1	26	153·8	45·6	30

Table 5. Imports from and U.K. exports and re-exports to selected countries

	Imports						Exports						Re-exports					
	1962			1963			1962			1963			1962			1963		
	Total imports	Imports by air		Total imports	Imports by air		Total UK exports	UK exports by air		Total UK exports	UK exports by air		Total re-exports	Re-exports by air		Total re-exports	Re-exports by air	
	£m. c.i.f.	£m. c.i.f.	Per cent of total imports	£m. c.i.f.	£m. c.i.f.	Per cent of total imports	£m. f.o.b.	£m. f.o.b.	Per cent of total exports	£m. f.o.b.	£m. f.o.b.	Per cent of total exports	£m. f.o.b.	£m. f.o.b.	Per cent of total re-exports	£m. f.o.b.	£m. f.o.b.	Per cent of total re-exports
West Germany	193·6	23·2	12·0	208·3	23·3	11·2	199·3	20·2	10·1	213·1	25·3	11·9	25·6	8·2	31·9	27·2	8·6	31·8
Netherlands	197·1	10·4	5·3	209·2	11·7	5·6	151·0	13·5	8·9	167·7	16·0	9·6	7·2	0·7	10·0	7·7	1·3	17·5
Belgium	72·5	7·4	10·2	87·1	7·3	8·3	91·9	6·3	6·9	99·8	8·1	8·1	4·7	0·9	18·4	6·1	1·0	17·0
France	131·5	27·2	20·7	153·6	29·8	19·4	138·0	31·5	22·8	180·7	36·4	20·1	14·3	7·0	48·5	13·8	7·4	53·9
Italy	112·6	14·9	13·2	110·0	14·7	13·4	139·1	13·8	9·9	163·6	14·5	8·9	9·4	3·2	33·9	11·6	4·2	36·3
Sweden	157·0	4·2	2·7	163·2	4·5	2·7	154·2	6·4	4·2	169·0	8·6	5·1	4·0	0·6	14·2	4·5	0·6	12·4
Denmark	152·1	2·3	1·5	164·7	2·8	1·7	103·5	2·6	2·5	105·1	3·0	2·8	1·9	0·1	7·6	2·0	0·3	16·8
Switzerland	52·5	15·4	29·2	61·1	17·7	29·0	63·9	6·1	9·5	72·1	8·9	12·4	4·5	1·7	37·2	5·0	2·1	41·7
Irish Republic	138·8	8·6	6·2	151·8	9·2	6·1	135·0	11·1	8·2	148·9	12·5	8·4	6·9	0·5	7·6	7·7	0·7	8·7
United States	476·4	57·8	12·1	498·8	68·4	13·7	327·0	41·8	12·8	340·3	45·2	13·3	20·5	10·0	48·7	20·1	9·4	46·8
Canada	348·9	7·7	2·2	368·4	8·5	2·3	187·9	16·9	9·0	172·6	14·9	8·6	6·4	1·8	27·9	6·9	2·4	35·5
India	135·9	3·2	2·4	140·8	2·6	1·8	116·5	4·3	3·7	136·6	3·2	2·4	1·7	0·8	50·2	1·3	0·7	52·0
Australia	185·2	1·9	1·0	206·4	3·9	1·9	228·4	4·8	2·1	235·7	4·3	1·8	2·3	0·3	15·3	2·1	0·4	17·2
Republic of South Africa	103·1	7·0	6·8	114·7	6·0	5·2	146·4	2·5	1·7	195·8	3·7	1·9	2·9	0·3	13·7	2·2	0·2	8·8
Japan	53·2	1·8	3·4	52·7	2·5	4·7	43·3	3·6	8·4	49·4	2·4	10·9	1·6	0·4	24·5	1·6	0·8	46·1
Total of above countries	8,510·6	193·1	7·7	2,691·0	212·9	7·9	2,225·5	185·4	8·3	2,450·3	210·0	8·6	113·0	36·4	32·2	119·9	40·2	33·5
All other countries	1,976·6	33·4	1·7	2,129·2	45·7	2·1	1,565·6	49·6	3·2	1,629·7	68·4	4·2	44·6	4·7	10·5	33·9	5·4	16·0
Grand Total	4,487·2	226·5	5·0	4,820·2	258·6	5·4	3,791·1	235·0	6·2	4,080·1	278·4	6·8	157·6	41·1	26·1	153·8	45·6	29·6

Table 6. Imports from and UK exports and re-exports to various areas

	Imports by air		UK exports by air		Re-exports by air	
	1962	1963	1962	1963	1962	1963
	£m. c.i.f.	£m. c.i.f.	£m. f.o.b.	£m. f.o.b.	£m. f.o.b.	£m. f.o.b.
Sterling Area	33·2	35·8	42·3	43·4	3·0	3·1
North America	65·5	77·0	59·0	60·3	11·8	11·9
Latin America	2·5	3·2	4·9	5·9	0·9	0·3
Western Europe	113·3	121·2	111·0	133·6	24·1	27·4
Middle East (except Sterling Middle East Countries)	5·9	7·5	9·8	9·9	0·6	1·5
Soviet Union and Eastern Europe	3·2	4·8	2·0	2·5	0·1	0·1
Rest of World	2·9	9·1	6·0	22·8	0·6	1·2
Total	226·5	258·6	235·0	278·4	41·1	45·6

Overdrafts of the nationalized industries

THE BANK overdrafts of the nationalized industries at June 17, 1964 totalled £50.6 million, of which £40.1 million were from the clearing banks and £10.5 million from the Scottish banks.

Report on the Census of Distribution and Other Services, 1961

THE following part of the Report of the Census of Distribution and Other Services, 1961 is now available and copies may be obtained from H.M. Stationery Office at York House, Kingsway, London, W.C.2, and branches or through booksellers:

Part 2: Summary Figures For Areas. Price 4s. 6d. each, postage 6d. extra.

Business Monitor: Production Series

THE following titles and issues of Business Monitor Production Series are now available, and copies may be obtained by annual subscription from H.M. Stationery Office, P.O. Box 569, London, S.E.1:

Monthly at £1 a year, post free:

Internal Combustion Engines for February 1964.
Tools and Implements for March 1964.
Electric Lamps for April 1964.
Locomotives for April 1964.
Wheeled Tractors for April 1964.
Timber – Softwood, Hardwood and Plywood for May 1964.

Quarterly at 7s. 6d. a year, post free:

Scientific and Industrial Instruments and Apparatus for January-March 1964.
Synthetic Resins and Plastics Materials for January-March 1964.

Northern Ireland index of industrial production

THE PROVISIONAL index of industrial production for Northern Ireland for April 1964, prepared by the Ministry of Commerce, is 129 (1958 = 100). This is 4 points lower than the index for March 1964, and 9 points higher than for April 1963.

The index numbers for the main industrial groups in April 1964, with the increase or decrease on April 1963 shown in brackets, are: textiles 132 (+ 17 points); clothing 128 (+ 3); engineering and metals 99 (+ 1); food, drink and tobacco 118 (+ 2); timber and furniture 103 (+ 4); other manufacturing industries 217 (+ 16); construction 150 (+ 27); gas, electricity and water 151 (+ 12).

Production of man-made fibres in May

TOTAL production of man-made fibres in May was 12 per cent more than in May, 1963; continuous filament and staple fibre each increased by this amount.

(Million lb. 'delivered weight' basis)

	Continuous filament (singles)	Staple fibre	Total
1960 (quarterly average)	67·2	80·8	148·0
1961 (quarterly average)	65·5	76·4	141·8
1962 (quarterly average)	72·7	84·1	156·8
1963 (quarterly average)	82·6	97·2	179·8
1963 1st quarter	76·7	95·3	172·0
4th quarter	90·5	107·2	197·7
1964 1st quarter	93.4	109·9	203·3
1963 March	27·0	33·4	60·5
April	26·1	31·5	57·6
May	28·8	33·2	62·0
	30·6	37·8	68·4
1964 March	31·1	35·8	66·9
April			
May	32·3	37·1	69·4

Production of synthetic resins, etc.

UNITED KINGDOM production of synthetic resins in the first quarter of 1964 was 212·4 thousand tons, 38·9 thousand tons or 22 per cent more than in the first quarter of 1963. Thermosetting resins at 69·4 thousand tons were 10·4 thousand tons or nearly 18 per cent higher than a year ago; during the same period thermoplastic resins at 143·0 thousand tons were 28·5 thousand tons or 25 per cent higher. Increases in production of thermosetting resins showed aminoplastics up by 16 per cent, alkyds by 18 per cent, phenolics and cresylics by over 6 per cent, with very large percentage increases in polyurethanes and epoxide resins, up by 60 and 74 per cent respectively. Increases in production of thermoplastic resins showed polyolefines up by 31 per cent, polyvinyl acetate up by nearly 33 per cent, and polystyrene by 11 per cent. By comparison with the first quarter of 1963, production of plastics materials derived from primary resins in the first quarter of 1964 was 25 per cent higher, with thermosetting materials up by 13 per cent, and thermoplastic materials up by 32 per cent. Sales were similarly higher.

Inquiry into the catering trades

A LARGE SCALE statistical inquiry covering the catering trades will be undertaken in 1965, in respect of business done in 1964, as part of the annual inquiry into the Distributive and Service Trades. The inquiry will be on similar lines to the last inquiry of this kind, which related to 1960.

Information will be obtained from restaurants, cafés, licensed hotels and public houses, canteens, catering contractors and licensed (proprietary) clubs regarding turnover stocks and capital expenditure. Firms will be asked to divide their total turnover for the year between the following headings: Sales of meals, Sales of alcoholic drink, Sales of tobacco and cigarettes, Sales of other goods, Receipts for board and lodging, Receipts for other services.

Firms with a turnover of under £5,000 will not be asked to make an analysis of their sales.

The inquiry will provide information about consumer expenditure and an up-to-date basis for the measurement of current trends in the catering trade. Further information about the inquiry, including details of questions to be asked, can be obtained by writing or telephoning to the Board of Trade, Census Office, Lime Grove, Eastcote, Ruislip, Middlesex. (PINner 8771, Ext. 18).

Cinema admissions and takings in April

DURING April, counted as a five-week period, the weekly average of admissions to cinemas in Great Britain was 7·5 million and the weekly average of gross box office takings was £1·31 million.

Pay-television and films levy

MR. EDWARD HEATH, Secretary of State for Industry, Trade and Regional Development has laid before Parliament, Regulations to amend the Cinematograph Films (Distribution of Levy) Regulations, 1963. The purpose of the Cinematograph Films (Distribution of Levy) (Amendment) Regulations, coming into operation on September 1, is to waive, in respect of the pay-television experiments, the existing provisions of the Regulations under which films forfeit their entitlement to levy benefits if they are shown on television up to 12 months after their registration.

In future any registered British film which is eligible for levy benefits will remain eligible even if an agreement for its showing on pay-television is in force at the time of its registration as a cinema film or even if it is hown on pay-television at any time save during the six months immediately prior to its registration.

The change has been approved by the Cinematograph Films Council.

Broadly speaking, standard (35 mm.) films exhibited to the public at cinemas in Breat Britain must be registered at the Board of Trade.

An announcement about the safeguards for cinema exhibitors in the areas selected for the pay-television experiments was made by the Assistant Postmaster-General in the House of Commons on May 5.

British film fund agency

THE BRITISH Film Fund Agency has published the following information for the five weeks ended May 30, 1964:

Distributors' earnings submitted:		
High cost films	£656,725	
Low cost films		
Eligible (after multiplying by 2½)	£104,305	
Not eligible for 2½ times rental	£9,838	
		£770,868
Films of less than 3,000 feet (after multiplying by 2½)		£84,457
		£855,325
Levy collections paid to Agency by H.M. Customs and Excise to June 1, 1964, approximately covering entertainments to May 30, 1964		£502,675

The seventh interim allocation for the seventh distribution period will be at the rate of 41 per cent.

Registrations of British and foreign films

The following are details of films registered by the Board of Trade under the Films Act, 1960, during the week ended Friday, June 26, 1964.
Where the title appears in italics the film forms part of a series. Br/E indicates that the film is a British quota film.

Title of Film	Registered in the name of	Makers Name	Registered No.	Playing Time Minutes	Date of Registration
	BRITISH				
Just For You	British Lion Films Ltd.	Delmore Film Productions Ltd.	Br/E 29527	64	June 22
Jack O' Diamonds	Saxon Film Co. Ltd.	George Moreno Film Productions Ltd.	Br/E 29581	4	June 23
Pathe Pic. Series 495/507: *Pathe Pic. No. 499*	Warner-Pathe Distributors Ltd.	Associated British Pathe Limited	Br/E 29584	8	June 26
Land of Magic	" "	" "	Br/E 29585	28	June 26
Shakespeare Land	" "	" "	Br/E 29586	22	June 26
Journey Through Britain	" "	" "	Br/E 29587	24	June 26
The Great Toy Robbery	Columbia Pictures Corp. Ltd.	National Film Board of Canada	Br/E 29588	7	June 26
Movietone News 1828A	Twentieth Century Fox Film Co. Ltd.	British Movietonews Ltd.	Br/E 29033	7	June 26
Movietone News 1829	" "	" "	Br/E 29034	7	June 26
Pathe News 64-51	Warner-Pathe Distributors Ltd.	Associated British-Pathe Ltd	Br/E 29098	7	June 26
Pathe News 64-52	" "	" "	Br/E 29099	8	June 26
	FOREIGN				
The World of Henry Orient	United Artists Corporation Ltd.	Pan Arts Company Inc.	F. 29526	106	June 22
Oil Thru' the Day	Twentieth Century Fox Film Co. Ltd.	Terrytoons Inc.	F 29582	6	June 24
The Kisser Plant	" "	" "	F 29583	5	June 24
Crook Who Cried Wolf	Columbia Pictures Corporation Ltd.	Columbia Pictures Corporation	F 29589	7	June 26
Raggedy Rug	" "	" "	F 29590	7	June 26

Government surplus sales by auction

MINISTRY OF DEFENCE (AIR FORCE DEPARTMENT)

1964	Stores	Location	Auctioneers
July 16 .	The sale will include timber and brick huts, cable and miscellaneous equipment.	Royal Air Force Stations, N. Luffenham, Polebrook and Harrington	Richardsons (AFD1), 15 Barn Hill, Stamford. (Tel. Stamford 3315/2580).
July 20, 21 and 22.	The sale will include 10 timber and brick huts, cable, underground tanks, and miscellaneous equipment.	Royal Air Force Stations, Hemswell, Bardney, Caister, Coleby Grange and Ludford Magna	John H. Walter & Sons (AFD1), 9/10 The Cornhill, Lincoln. (Tel. Lincoln 25454).
July 23 .	167 acres of land to be offered for sale by auction in 7 lots, including two T.2 hangars and other buildings, suitable for use as a storage depot.	Gamston Airfield, Retford, Notts. . .	Crampton, Sooby and Eastgate (AFD1), West Gate, Mansfield, Notts. (Tel. Mansfield 5717).
July 30 .	Miscellaneous stores and equipment. .	No. 25 Maintenance Unit, Royal Air Force, Hartlebury.	Nock & Joseland (AFD1), Bank Buildings, Kidderminster, Worcs. (Tel. Kidderminster 2053).
Aug. 13 .	Miscellaneous stores and equipment . .	No. 14 Maintenance Unit, Royal Air Force, Carlisle.	Harrison & Hetherington Ltd. (AFD1), Botchergate, Carlisle. (Tel. Carlisle 26292).
Aug. 19 .	Miscellaneous stores and equipment . .	No. 7 Maintenance Unit, Royal Air Force, Quedgeley.	Bruton Knowles & Co. (AFD1), Albion Chambers, King Street, Gloucester. (Tel. Gloucester 21267).

Catalogues for the above sales may be obtained within fourteen days of the advertised dates of the sales on application to the Auctioneers. Catalogues for sales held at Maintenance Units cost 1s. 0d. (*Postal Orders only*), all other catalogues free.

MINISTRY OF DEFENCE (ARMY DEPARTMENT)

1964	Stores	Location	Auctioneers
July 16 .	Machine tools and miscellaneous stores .	Technical Stores Depot, Old Dalby, Leics. (Sale at Melton Mowbray).	Shouler & Son (Dept. L), 1 Norman Street, Melton Mowbray, Leics. (Tel. 3081).
July 21-23 .	Vehicles, earthmoving, road making and lifting equipment, trailers, plant ancillaries and spares, motor cycles, etc.	Ordnance Storage and Disposal Depot, Ruddington, Notts.	Walker, Walton & Hanson, (Nept. L), Byard Lane, Bridlesmith Gate, Dottingham. (Tel. 54272).

Approximately 200 saloons, limousines and estate cars, (including Austin Princess limousines, Chevrolet and American Ford sedans, Ford Anglias, Populars, Morris Minors and Mini Minors), 180 Land Rovers and 100 Austin Champs (single lots), coaches, heavy duty trucks and tractors by A.E.C. Diamond T, Leyland and Scammell, hydraulic tippers, 4-wheeled drive trucks fitted winches by Humber, and many other types of load carrying and dual purpose vehicles. Excavators by North West, crawler tractors and angledozers by Caterpillar and Fowler, mobile cranes by Coles, Morris, Neals, and Ransomes & Rapier, motor grader by Aveling Austin, dumpers, trencher, forklift and other factory trucks, fitted mobile workshops, servicing and fire pump trailers, mobile tankers 100 to 1,500 galls., trailers 10 cwts. to 20 tons, also plant ancillaries and spares by Caterpillar, Fowler, Jones, La Plante Choate, Le Tourneau' Newton Chambers, (including complete conversion units—base machine to drag and face shovel), pile driving equipment, tracks, buckets, dozer blades, etc., also solo and combination motor cycles and 40 Daimler armoured cars.

July 23 .	Plant, engineering and electrical stores, wireless and telephone spares, etc.	Technical Stores, Sub-Depot, Wem, Salop .	Hall, Wateridge & Owen (Dept. L), High Street, Shrewsbury, (Tel. 2081).
July 28 .	Vehicles, industrial equipment, machine tools, pocket watches and miscellaneous stores.	Ordnance Disposal Depot, Royal Arsenal, Woolwich, London, S.E.18.	Fuller, Horsey, Sons and Cassell (Dept. L), 10 Lloyds Avenue, London, E.C.3. (Tel. Royal 4861).

Catalogues for each sale shown above may be obtained from the appropriate Auctioneer 14 days prior to date of sale, price 1s. 0d. (*Postal Orders only*).

MINISTRY OF PUBLIC BUILDING AND WORKS

1964	Description of Goods	Location	Auctioneers
July 7 .	Office and miscellaneous furniture, domestic refrigerators, electric and other fittings, canteen equipment, crockery, etc.	Ministry of Public Building and Works, Supplies Division Stores, Shed 10, Site 1, Kidbrooke Park Road, London, S.E.3.	Hollingsworth, 6 Snow Hill (2nd Floor), Holborn Viaduct, London, E.C.1. (Tel. City 1718).
July 10 .	Office and miscellaneous furniture, safes, clocks, kitchen equipment, refrigerators, plan presses and builders equipment.	Ministry of Public Building and Works, Supplies Division Store, Burnett Lane, Nr. Keynsham, Somerset.	Stanley Alder & Price, 7 St. Stephens Street, Bristol 1. (Tel. Bristol 20301).

Catalogues: Price 1s. 0d., obtainable from the auctioneer.
View days: Thursday July 9, 1964.

The Companies Registers (Malaysia) Order 1964

THE COMPANIES Registers (Malaysia) Order 1964, which came into operation on June 30, 1964, extends the provisions of Sections 119 to 121 of the Companies Act, 1948 to the whole of Malaysia.

The effect of the Order is to enable a company registered in Great Britain and transacting business in Malaysia to keep a single branch register (referred to in the Act as a dominion register) in Malaysia of its members resident in that country. Branch registers facilitate and expedite the local transfer of shares. Prior to the setting up of the Federation of Malaysia it was necessary for historical reasons for companies to keep separate branch registers, e.g. for their members in the Federation of Malaysia and for those in Singapore.

A consequence of the Order is the revocation of the Companies Registers (Federation of Malaya) Order 1962.

Copies of the Order (S.I. 1964 No. 911) are obtainable from HM Stationery Office. Price 3d., by post 6d.

Mr. M. Weber, the Controller, Board of Trade, South Western Region and Mr. E. J. Pearce, also of the Board of Trade, South Western Region, recently visited the factory of Walker Crosweller and Co. Ltd., at Cheltenham, Glos., whose exports of thermostatic mixing valves and measuring instruments total some 50 per cent of their total production. Seen from left to right: Mr. Pearce, Mr. M. O. Hiscock the company's export manager, Mr. Weber, and Mr. R. F. Walker, the company's chairman and managing director.

Broadsheets on Britain

'AGRICULTURE IN BRITAIN' and 'Britain's Balance of Payments' are the titles of the two latest broadsheets in the 'Looking Ahead' series, Nos. 19 and 20 respectively. Agriculture, which employs nearly 4 per cent of our working population and produces about one-half of all food consumed in Britain, will cost the Government an estimated £327 million in support during the current financial year (1964/5). The broadsheet describes the changes in employment, output and Government support policy on agriculture during past years. It refers to Government action to secure greater market stability, setting out the arrangements for 'standard quantities' for home production and negotiations with our overseas suppliers about imports, and mentions the provisions made for horticulture in the Agriculture and Horticulture Act of 1964.

The balance of payments is always a big factor in Britain's economic situation, and concerns all Britain's dealings with other countries. Broadsheet No. 20 explains what it is, and when changes are favourable or unfavourable.

Britain's exports and imports – her visible trade – are both worth over £4,000 million a year; payments and receipts for invisibles – such things as shipping and insurance, tourism and investments – are each worth over £2,000 million a year. The broadsheet explains the overall position, long-term capital reserves and short-term liabilities, monetary movements, and the balancing item, and what Government action would be needed to prevent any tendency for our reserves to fall and our short-term liabilities to rise. Each broadsheet contains an explanatory diagram. Copies: Free from Circulation Section (H), Publications Division, Central Office of Information, Hercules Road, London, S.E.1.

New design award for design management

THE Royal Society of Arts has instituted a new award to recognise outstanding examples of design policy in commercial and industrial organizations and public undertakings in this country under British control. The award, which will be made only as occasion requires, will take the form of a silver-gilt medal, to be known as 'The Royal Society of Arts Presidential Medal for Design Management'.

LETTERS TO THE EDITOR

Editorial communications should be addressed to the Editor, **Board of Trade Journal,** *Room 227A, Board of Trade, 1 Victoria Street, London, S.W.1. (Tel. Abbey 7877, Ext. 2656).*

Regional Organization of the Board of Trade

For information and guidance on export matters or on any other aspect of the work of the Board of Trade – including, for example, advice about location, which is available to industrial concerns seeking to expand or to develop new projects – you are invited to get in touch in the first instance with the nearest Regional Office. If you would prefer it, the Controller or a senior member of his staff will gladly arrange to meet you are your own address. The names of the Controllers and the addre sses, Subscriber Trunk Dialling Codes and Telex Numbers of the Regional Offices of the Department are given below.

Northern Region
Wellbar House, Gallowgate,
Newcastle-upon-Tyne, 1. (Tel. Newcastle 27575. Code: ONE 2. 27575. Telex No. 53178.)
R. Wood

Yorkshire and Lincolnshire Region
Pearl Chambers, East Parade, Leeds, 1. (Tel. Leeds 31761. Code: OLE 2. 31761. Telex No. 55265.)
E. Atherton.

Eastern Region
Cromwell House, Dean Stanley Street, London, S.W.1. (Tel. Tate 4355. Telex No. 25991.)
D. A. Wilson, C.B.E.

London and South Eastern Region
Cromwell House, Dean Stanley Street, London, S.W.1. (Tel. Tate 4355. Telex No. 25991.)
J. W. Stoodley.

South Western Region
Prudential Buildings, Wine Street, Bristol, 1. (Tel. Bristol 294821.
Code: OBR 2. 204821. Telex No. 44214.)
M. Weber.

Wales
Government Buildings, Gabalfa, Cardiff. (Tel. Cardiff 62151. Code: OCA 2. 62151. Telex No. 49267.)
R. W. Daniel, C.B.E.

Midland Region
Somerset House, 37 Temple Street, Birmingham, 2. (Tel. Birmingham Midland 8221.
Code: 021. MID 8221. Telex No. 33702.)
P. J. L. Homan.

North Western Region
76 Newton Street, Manchester 1 (Tel. Manchester Central 2171. Code: 061. CEN 2171. Telex No. 66104.)
R. J. Forbes, C.B.E.

Scotland
314 St. Vincent Street, Glasgow, C2. (Tel. Glasgow City 2855. Code: 041. City 2855. Telex No. 77583.) District Office: 29a High Street, Inverness (Tel. Inverness 31998. Code OIN 3. 31998.)
C. J. A. Whitehouse, O.B.E.

Northern Ireland
Ministry of Commerce (Northern Ireland), Chichester House, Chichester Street, Belfast. (Tel. Belfast 28271. Code: OBE 2. 28271. Telex No. 74578.)
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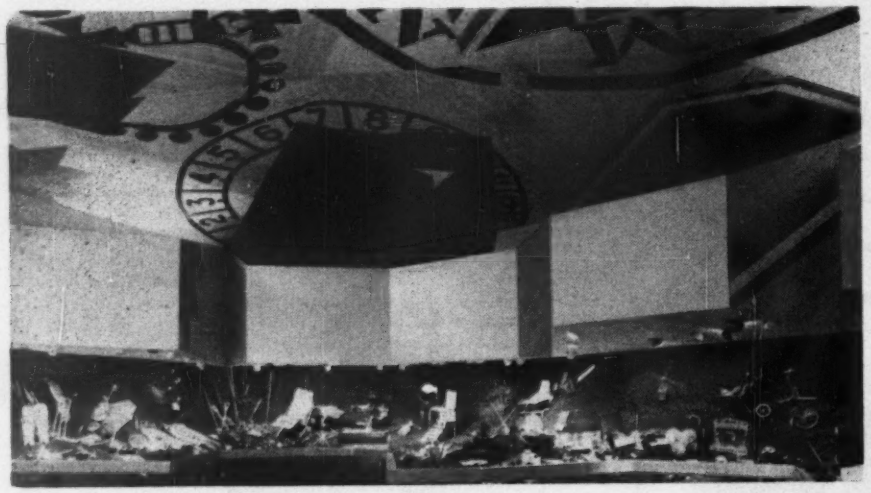
Exhibitions and Fairs

Britain's role at the Milan Triennale

BY PAUL REILLY, DIRECTOR OF THE COUNCIL OF INDUSTRIAL DESIGN AND COMMISSIONER FOR THE BRITISH SECTION OF THE EXHIBITION



A section of the British stand at the Milan Triennale.

NO-ONE CAN say for certain that there will be a 14th Triennale exhibition in Milan, just as no-one could say for certain that the 13th Triennale would open on its appointed day after three postponements. But what can be said is that for all the delays and muddles attending the opening of this year's event on June 12, the Triennale is still one of the liveliest, most imaginative exhibitions of architecture and design in the world.

The Triennale has always been a controversial exercise. Countries with conventional views of international exhibitions have fought shy of this one which is so far removed from anything resembling a trade fair. But great reputations have been made in Milan by others who have taken longer views, by Finland for instance or Norway or Sweden or Denmark and not least by the Italians themselves. The post-war Triennale have been the best showcases for design-minded countries to show their paces. But equally because they have been so successful, the formula has tended to be repeated from exhibition to exhibition, each country displaying its finest arts and crafts in its cleverest way, but each year becoming a little staler.

The organizers were right therefore to start imposing a theme for each exhibition. In 1960 it was 'School and Home' and Britain very properly entered the lists and scooped the pool; our prefabricated school erected by the Ministry of Education was rightly adjudged the outstanding exhibit of the year. But that display at the 12th Triennale had been the first official British contribution ever staged at this world famous exhibition and afterwards there was no guarantee that Britain would not slide out again.

Fortunately the Federation of British Industries took the lead in canvassing the case for continued British participation and a working party representing the FBI, the Royal Society of Arts, the Royal Institute of British Architects, the Society of Industrial Artists, the Design and Industries Association and the CoID submitted a memorandum to the Board of Trade urging another official contribution to the 13th exhibition. The arguments were accepted and the CoID and the COI were authorized by the Board of Trade to stage a substantial display in the international section.

The CoID however urged the organizers to stop thinking of the Triennale as an Italian exhibition with various national contributions, but instead as an international exhibition with no one country overpowering the rest. We also urged that the next theme should be strictly adhered to by all participating countries. In the event both suggestions were accepted, with the result that this year's show is both better balanced and more coherent.

The agreed theme – a difficult but socially important one – was "Free Time" or the constructive use of leisure, each country being asked to concentrate on those aspects on which it had something exceptional to say. The Italians chose the sea and the lakes and the coasts with all their opportunities for sport and spoliation; the Germans chose the theatre and presented their display with a typically disciplined elegance; the Brazilians simply slung a host of gay hammocks, each seeming on the opening day to hold a young well bronzed reclining body; the Finns showed more energetic pursuits – skiing, running, shooting, ending with a sauna; the French examined the main requirements for cultivated leisure in the home; the Canadians invited enjoyment of their wide open spaces; it was not clear what the Americans had in mind for their exhibits had not arrived by the opening day; but by and large each country had stuck to the theme of free time.

And what of Britain? To my prejudiced eye Great Britain again rang the bell most loudly and truly. Theo Crosby, the architect/designer appointed by the Council of Industrial Design, had with the utmost ingenuity revealed in a relatively small space practically every aspect of British leisure from gardening to mountaineering, from reading to racing and had backed up most of them with an appropriate group of well designed equipment imaginatively displayed on an arc of imitation greensward, above which rose five separate screens for frequent projection to specially commissioned music of specially photographed coloured slides of Britons at play. And above again a plain timber dome like a sort of packing case boldly decorated with stencilled British symbols rendered in a cheerfully irreverent pop-art manner. The whole area was deeply carpeted, a friendly gesture to tired feet.

After gazing round this colourful scene with its array of goods, its changing lights, its quick-fire slides and its catchy music, the German commissioner said to me 'You must be a happy people'. Not a bad note perhaps on which to sell ourselves nor one that was contradicted by the most successful of all our exhibits – the student designed and built Hornsey College of Art 'mobile shelter' that from the opening day has drawn admiring crowds to the open air section of the exhibition. All in all, I think, a good job by Britain that should win friends and influence people.

UK among largest exhibitors at Poznan

THE THIRTY-THIRD Poznan International Fair was held from June 7-21. It was opened by Mr. J. Cyrankiewicz, Prime Minister of Poland, who was accompanied by Mr. W. Gomulka, First Secretary of the Polish United Workers' Party, Mr. W. Trampcynski, Minister of Foreign Trade, and other officials. The Minister of Foreign Trade in one of the opening speeches stressed that Poland laid great importance on trade with West European countries. After the opening ceremony the official party visited the pavilions and spent some time in the British collective display in two halls and also in an adjacent outside area. Fifty-four countries participated in the Fair, the largest displays being those of West Germany, the United States, the Soviet Union and the United Kingdom. This was Britain's 25th participation at the Poznan Fair.

The predominant feature of the British display was its commercial character with most of the firms exhibiting goods for which there is a definite Polish market. Since all purchases are made by the foreign trade enterprises the Poznan International Fair provides a unique opportunity for the actual end-users to see the full range of goods available. Polish technicians thus have an opportunity to discuss details directly with the manufacturers. Conversely, the manufacturers have the opportunity to demonstrate to the end-users the range of equipment before an actual order is placed by the foreign trade enterprises on their behalf.

Since Poland currently has a favourable trade balance with the United Kingdom British exhibitors are hopeful of orders being placed following their participation at the Fair.

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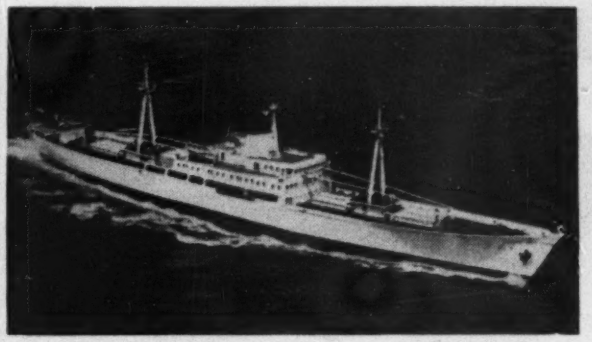

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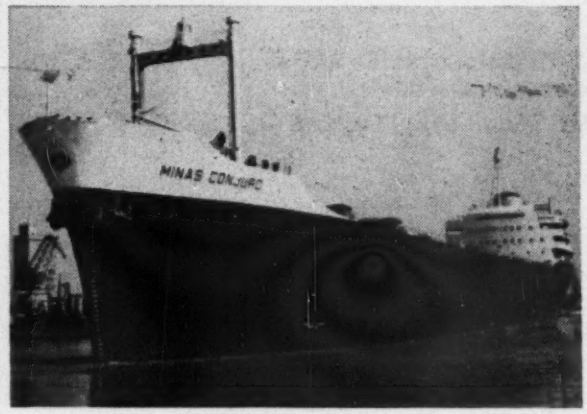

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Continuing, the Secretary of State said that he was sure that the industry's export performance had been achieved through their energy in overseas exhibitions. 'We were glad to be able to help the Machine Tool Trades Association to put on their successful display of machine tools in Detroit in April. The Americans and Canadians were obviously impressed by your products.' He added that he was glad too, to see so large a display of machine tools when he visited the British Industrial Exhibition at Barcelona last April. 'I know from what I heard then that the Spaniards were extremely interested in what you showed them. I look forward to seeing the results of all this promotion work showing up in your order books, and in our export trade figures.'

The Secretary of State said: 'Yours is an industry with a strenuous and rewarding future before it. Its success will play a great part in Britain's industrial future.'

The exhibition featured a more comprehensive range of machine tools and ancillary equipment than had previously been shown at Olympia. The period since the last show has witnessed some intensive development in the industry and the fruits of this research and development was clearly visible on the various exhibitors' stands.

Minister of State opens exhibition of house journals

MR. EDWARD DU CANN, Minister of State, Board of Trade, opened the first exhibition of house journals, presented by the British Association of Industrial Editors, at the National Book League Galleries in London on June 22. The main object of the exhibition, which ran to July 3, was to underline the purpose of the house journal in industry and to show how this medium can be used to serve the need for better communication within industry and between industry and its markets. It was particularly aimed at management and at those firms which still do not publish a house journal.

The Minister of State said that the exhibition was a 'notable first'. He hoped that journals would expand greatly in their distribution overseas thus fulfilling an important ambassadorial rôle for British industry. Something like £15 million was spent annually on house journals of which it was estimated there were 1,500 with a conservatively estimated readership of 15 million. The Minister hoped that where appropriate journals could be produced in foreign languages for overseas readers. He congratulated the BAIE on their initiative in organizing the exhibition and for the valuable part they were playing in raising standards of production.

BRITISH OVERSEAS FAIRS LTD.

British Overseas Fairs Ltd., the branch of F.B.I. which organizes British participation in exhibitions in various parts of the world, in consultation with the Board of Trade, is at 21 *Tothill Street, London, S.W.*1. (*Tel. Abbey* 6376).

'Twinning' of famous London and Rome streets

AN OFFICIAL party from the Bond Street Association, London recently visited Rome at the invitation of the Via Condotti Association. Supported by the Board of Trade, the party consisted of Mr. Carl Nater, chairman of the Bond Street Association, Mr. Holt Mackenzie, the president, Mr. Algernon Asprey, past chairman, Ald. Patricia M. Hayward, and two Coventry City police sergeants – Norman Farnden and June Massey.

During the visit Ald. Hayward presented a Bond Street Association plaque together with addresses of welcome from the Mayors of St. Pancras and of Westminster to the Mayor of Rome. The Via Condotti was decorated with British and Italian flags, and every shop window featured a card bidding welcome to the Bond Street Association on the occasion of the 'twinning' of the two streets. The shops also featured in their window displays some tribute to Britain. The 'twinning' ceremony was attended by the members of the Bond Street and Via Condotti Associations, the two police sergeants, and Mr. D. S. Laski, H.M. Minister, Rome and Mr. J. Rooke, H.M. Counsellor (Commercial), Rome.

In return the Via Condotti Association presented a plaque to the members of the London Association together with three medals – one commemorating the twinning' ceremony, one from the Rome Chief of Police, and one from the Mayor of Rome.

CHANGES IN TRADE FAIRS AND EXHIBITIONS ANNOUNCEMENTS

BECAUSE *of pressure on space all the various classified lists of trade fairs and exhibitions will be published in full only on the dates indicated blow*:

	Date last published	Date next published
Outside Europe . .	*This Issue*	*Oct.* 2
Europe . .	*June* 5	*Sept.* 4
United Kingdom . .	*May* 1	*Aug.* 7

Amendments and additions to the three lists will be shown in the issues of the intervening weeks.

No responsibility is taken for the standing of organizations or individuals mentioned in the lists, and dates, etc., may be subject to alteration.

*The Board of Trade Export Promotion and Fairs Branch, Queen Anne's Mansions, Queen Anne's Gate, S.W.*1. (*Tel. Abbey* 7877, *Ext.* 2791, *Germany and Scandinavia*: 2783, *France Italy, Benelux, Switzerland, Austria, Finland, Spain, Portugal, Irish Republic, Greece, Turkey, Middle East and West Africa*: 2792. *United Kingdom and Rest of the World*) *will be glad to answer general inquiries, but applications should be made to the organizers or United Kingdom agents for details of cost and conditions of participation. Export Promotion and Fairs Branch can also provide information about other events which, owing to space limitation, are not included in the lists.*

• *indicates event which is held annually at approximately the time stated.*
•• *indicates event which is held alternate years at approximately the time stated.*

Amendments and Additions to Classified Lists

The fairs and exhibitions given below are amendments and additions to the full lists published in the *Board of Trade Journal* on June 5 and May 1 respectively.

EUROPE

Amendments:

The Board of Trade have been informed that the Interior Furnishing Exhibition (Inter-Decor) which was to have been held at Utrecht from September 28-October 3, 1964, will not now take place.

The Board of Trade have now been informed that inquiries about the Metz International Trade Fair, September 30-October 11, 1964, should be addressed to Mrs. Muriel C. Black, London office of the Metz Fair, 47 Nottingham Place, London, W.1. (Tel. Welbeck 9759).

Additions:

LYONS: FURNITURE FAIR (Meuropam and Pro-Meuropam)—October 3-6, 1964.
Apply, Exhibitions & Trade Fairs Ltd., 10 Clifford Street, London, W.1. (Tel. Regent 0511).

DIJON: THE FIRST NATIONAL FAIR OF FOODS, WINES AND GASTRONOMY – October 30-November 11, 1964.
• Apply: Administration de la Foire Gastronomique, Palais des Expositions, Boulevard de Champagne, Dijon.

GOTHENBURG: SWEDISH BOAT SHOW – February 11-21, 1965.
• Apply: A.B.Interexpo, Stampgatan 38, Gothenburg, C.

LYONS: INTERNATIONAL EXHIBITION OF GAMES AND TOYS (SILJOUET) – February 21-27, 1965.
Apply: Exhibitions & Trade Fairs Ltd., 10, Clifford Street, London, W.1. (Tel. Regent 0511).

LYONS: INTERNATIONAL TRADE FAIR – March 20-29, 1965.
• Apply, Exhibitions & Trade Fairs Ltd., 10, Clifford Street, London, W.1. (Tel. Regent 0511).

METZ: 'EXPOMETZ' (CONSUMER GOODS) FAIR – April 1-11, 1965.
Apply, Mrs. Muriel C. Black, London Office of the Metz Fair, 47 Nottingham Place, London, W.1. (Tel. Welbeck 9759).

SAARBRUCKEN: SIXTEENTH INTERNATIONAL SAAR FAIR – May 15-27, 1965.
• Apply, Saarmesse, Saarlandischer Gesteltungskreis am Schanzenberg, Saarbrucken.

UNITED KINGDOM

Addition:

MANCHESTER: 'EVENING NEWS AND CHRONICLE' BRIGHTER HOMES EXHIBITION – March 9-27, 1965.
Apply, Provincial Exhibitions Ltd., City Hall Deansgate, Manchester 3. (Tel. Deansgate 6363).

'Shopping in Britain' display at CoID

THE COUNCIL of Industrial Design have arranged another display of modern British goods selected with the overseas visitor particularly in mind. The first of these 'tourist season' displays was shown in 1960, and 'Shopping in Britain' has now become a regular event in The Design Centre's annual programme.

This year's display which opened on June 29 and continues until August 19 features some 300 well-designed products including cutlery, flatware, pottery, glassware, textiles, jewellery, plastic tableware, radios, rugs, sports equipment, ceramic tiles, garden tools, woodware, travel goods, toys and souvenirs.

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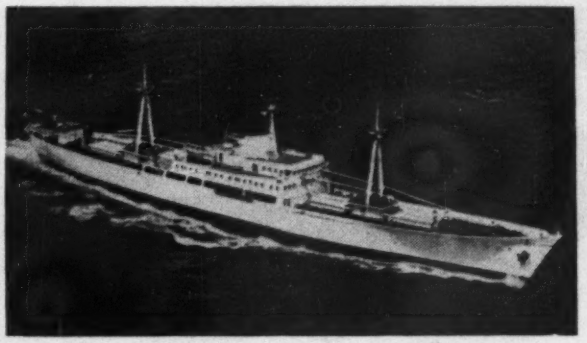

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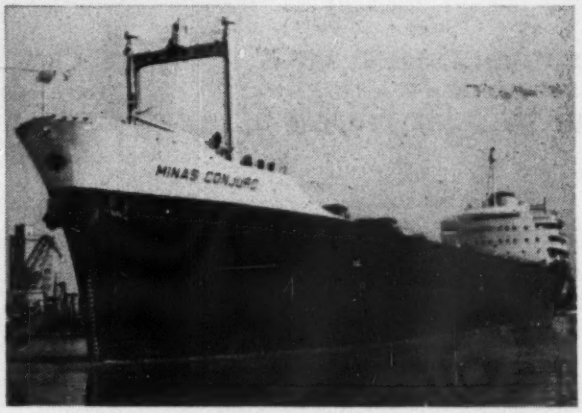

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The exhibition featured a more comprehensive range of machine tools and ancillary equipment than had previously been shown at Olympia. The period since the last show has witnessed some intensive development in the industry and the fruits of this research and development was clearly visible on the various exhibitors' stands.

Minister of State opens exhibition of house journals

MR. EDWARD DU CANN, Minister of State, Board of Trade, opened the first exhibition of house journals, presented by the British Association of Industrial Editors, at the National Book League Galleries in London on June 22. The main object of the exhibition, which ran to July 3, was to underline the purpose of the house journal in industry and to show how this medium can be used to serve the need for better communication within industry and between industry and its markets. It was particularly aimed at management and at those firms which still do not publish a house journal.

The Minister of State said that the exhibition was a 'notable first'. He hoped that journals would expand greatly in their distribution overseas thus fulfilling an important ambassadorial rôle for British industry. Something like £15 million was spent annually on house journals of which it was estimated there were 1,500 with a conservatively estimated readership of 15 million. The Minister hoped that where appropriate journals could be produced in foreign languages for overseas readers. He congratulated the BAIE on their initiative in organizing the exhibition and for the valuable part they were playing in raising standards of production.

BRITISH OVERSEAS FAIRS LTD.

British Overseas Fairs Ltd., the branch of F.B.I. which organizes British participation in exhibitions in various parts of the world, in consultation with the Board of Trade, is at 21 *Tothill Street, London, S.W.*1. (*Tel. Abbey* 6376).

'Twinning' of famous London and Rome streets

AN OFFICIAL party from the Bond Street Association, London recently visited Rome at the invitation of the Via Condotti Association. Supported by the Board of Trade, the party consisted of Mr. Carl Nater, chairman of the Bond Street Association, Mr. Holt Mackenzie, the president, Mr. Algernon Asprey, past chairman, Ald. Patricia M. Hayward, and two Coventry City police sergeants – Norman Farnden and June Massey.

During the visit Ald. Hayward presented a Bond Street Association plaque together with addresses of welcome from the Mayors of St. Pancras and of Westminster to the Mayor of Rome. The Via Condotti was decorated with British and Italian flags, and every shop window featured a card bidding welcome to the Bond Street Association on the occasion of the 'twinning' of the two streets. The shops also featured in their window displays some tribute to Britain. The 'twinning' ceremony was attended by the members of the Bond Street and Via Condotti Associations, the two police sergeants, and Mr. D. S. Laski, H.M. Minister, Rome and Mr. J. Rooke, H.M. Counsellor (Commercial), Rome.

In return the Via Condotti Association presented a plaque to the members of the London Association together with three medals – one commemorating the twinning' ceremony, one from the Rome Chief of Police, and one from the Mayor of Rome.

CHANGES IN TRADE FAIRS AND EXHIBITIONS ANNOUNCEMENTS

BECAUSE *of pressure on space all the various classified lists of trade fairs and exhibitions will be published in full only on the dates indicated blow*:

	Date last published	Date next published
Outside Europe . .	*This Issue*	*Oct.* 2
Europe . .	*June* 5	*Sept.* 4
United Kingdom . .	*May* 1	*Aug.* 7

Amendments and additions to the three lists will be shown in the issues of the intervening weeks.

No responsibility is taken for the standing of organizations or individuals mentioned in the lists, and dates, etc., may be subject to alteration.

*The Board of Trade Export Promotion and Fairs Branch, Queen Anne's Mansions, Queen Anne's Gate, S.W.*1. (*Tel. Abbey* 7877, *Ext.* 2791, *Germany and Scandinavia*: 2783, *France Italy, Benelux, Switzerland, Austria, Finland, Spain, Portugal, Irish Republic, Greece, Turkey, Middle East and West Africa*: 2792. *United Kingdom and Rest of the World*) *will be glad to answer general inquiries, but applications should be made to the organizers or United Kingdom agents for details of cost and conditions of participation. Export Promotion and Fairs Branch can also provide information about other events which, owing to space limitation, are not included in the lists.*

• *indicates event which is held annually at approximately the time stated.*
•• *indicates event which is held alternate years at approximately the time stated.*

Amendments and Additions to Classified Lists

The fairs and exhibitions given below are amendments and additions to the full lists published in the *Board of Trade Journal* on June 5 and May 1 respectively.

EUROPE

Amendments:

The Board of Trade have been informed that the Interior Furnishing Exhibition (Inter-Decor) which was to have been held at Utrecht from September 28-October 3, 1964, will not now take place.

The Board of Trade have now been informed that inquiries about the Metz International Trade Fair, September 30-October 11, 1964, should be addressed to Mrs. Muriel C. Black, London office of the Metz Fair, 47 Nottingham Place, London, W.1. (Tel. Welbeck 9759).

Additions:

LYONS: FURNITURE FAIR (Meuropam and Pro-Meuropam)—October 3-6, 1964.
Apply, Exhibitions & Trade Fairs Ltd., 10 Clifford Street, London, W.1. (Tel. Regent 0511).

DIJON: THE FIRST NATIONAL FAIR OF FOODS, WINES AND GASTRONOMY – October 30-November 11, 1964.
• Apply: Administration de la Foire Gastronomique, Palais des Expositions, Boulevard de Champagne, Dijon.

GOTHENBURG: SWEDISH BOAT SHOW – February 11-21, 1965.
• Apply: A.B.Interexpo, Stampgatan 38, Gothenburg, C.

LYONS: INTERNATIONAL EXHIBITION OF GAMES AND TOYS (SILJOUET) – February 21-27, 1965.
Apply: Exhibitions & Trade Fairs Ltd., 10, Clifford Street, London, W.1. (Tel Regent 0511).

LYONS: INTERNATIONAL TRADE FAIR – March 20-29, 1965.
• Apply, Exhibitions & Trade Fairs Ltd., 10, Clifford Street, London, W.1. (Tel Regent 0511).

METZ: 'EXPOMETZ' (CONSUMER GOODS) FAIR – April 1-11, 1965.
Apply, Mrs. Muriel C. Black, London Office of the Metz Fair, 47 Nottingham Place, London, W.1. (Tel. Welbeck 9759).

SAARBRUCKEN: SIXTEENTH INTERNATIONAL SAAR FAIR – May 15-27, 1965.
• Apply, Saarmesse, Saarlandischer Gesteltungskreis am Schanzenberg, Saarbrucken.

UNITED KINGDOM

Addition:

MANCHESTER: 'EVENING NEWS AND CHRONICLE' BRIGHTER HOMES EXHIBITION – March 9-27, 1965.
Apply, Provincial Exhibitions Ltd., City Hall Deansgate, Manchester 3. (Tel. Deansgate 6363).

'Shopping in Britain' display at CoID

THE COUNCIL of Industrial Design have arranged another display of modern British goods selected with the overseas visitor particularly in mind. The first of these 'tourist season' displays was shown in 1960, and 'Shopping in Britain' has now become a regular event in The Design Centre's annual programme.

This year's display which opened on June 29 and continues until August 19 features some 300 well-designed products including cutlery, flatware, pottery, glassware, textiles, jewellery, plastic tableware, radios, rugs, sports equipment, ceramic tiles, garden tools, woodware, travel goods, toys and souvenirs.

Trade fairs and exhibitions outside Europe

1964: General

TEL-AVIV: INTERNATIONAL TRADE FAIR – June 16-July 7.
† Apply, Industrial and Trade Fairs Ltd., Commonwealth House, New Oxford Street, London, W.C.1. (Tel. Chancery 9011).

WELLINGTON: NEW ZEALAND SECOND INTERNATIONAL TRADE FAIR – August 20-September 5.
Apply, The Secretary, Wellington Show Association Inc., P.O. Box 6141, Wellington, New Zealand.

IZMIR: INTERNATIONAL TRADE FAIR – August 20-September 20.
* Apply, The Secretary, The British Chamber of Commerce of Turkey (Inc.), P.O. Box 190, Galata-Istanbul, Turkey.

TORONTO: CANADIAN NATIONAL EXHIBITION – August 21-September 7.
* At Exhibition Park. Apply, Canadian National Exhibition Representative, Columbia House, 3 Lower Regent Street, London, S.W.1. (Tel. Whitehall 2794).

BOGOTA: FIFTH INTERNATIONAL AND SECOND LATIN AMERICAN COMMON MARKET INDUSTRIAL FAIR (LAFTA) – August 28-September 13.
Apply, Corporation of Fairs and Exhibitions S.A. Bogota, Colombia.

SAN FRANCISCO: 7TH WORLD TRADE FAIR – September 10-20.
Apply, United States World Trade Fair, 331 Madison Avenue, New York 17, N.Y.

SYDNEY: BRITISH EXHIBITION, AUSTRALIA – September 25-October 10.
Apply, British Overseas Fairs Ltd., 21 Tothill Street, London, S.W.1. (Tel. Abbey 6376).

ALGIERS: INTERNATIONAL FAIR – September 26-October 11.
Apply Secretariat Permanent, Palais Consulaire, Place des Martyrs, Algiers.

PEKING: BRITISH EXHIBITION – November 2-14.
Apply, Industrial and Trade Fairs Ltd., Commonwealth House, 1/19 New Oxford Street, London, W.C.1. (Tel. Chancery 9011).

1964: Specialized

Agricultural, Fishing, Dairy

PALERMO, BUENOS AIRES: ANNUAL LIVESTOCK SHOW OF ARGENTINE RURAL SOCIETY – July 13-August 2.
* Apply, Sociedad Rural, Buenos Aires, Argentine.

Automation

NEW YORK: 19TH INTERNATIONAL INSTRUMENT-AUTOMATION CONFERENCE AND EXHIBITION – October 12-15.
* At the Coliseum. Apply, Instrument Society of America, 530 William Penn Place, Pittsburg, Pennsylvania.

Boats

CHICAGO: MARINE TRADES EXHIBITION AND CONFERENCE – September 17-20.
* Apply, Outboard Boating Club of America, 307 North Michigan Avenue, Chicago 1, Illinois.

Building

CHICAGO: NATIONAL ASSOCIATION OF HOME BUILDERS 21ST ANNUAL CONVENTION AND EXPOSITION – December 6-10.
* At McCormick Place. Apply, Mr. Paul S. Van Auken, 140 South Dearborn Street, Chicago, Illinois.

Chemical

CHICAGO: 12TH NATIONAL CHEMICAL EXPOSITION – September 1-4.
At Conrad Hilton Hotel. Apply, Chicago Section, American Chemical Society, 56 East Randolph Street, Chicago 1, Illinois.

TORONTO: CANADIAN CHEMICAL AND EQUIPMENT EXHIBITION – October 27-30.
Apply, Mr. J. R. MacDonald, Exhibition Manager, 1450 Don Mills Road, Don Mills, Ontario.

Electrical, radio, television, electronics

LOS ANGELES: WESTERN ELECTRONIC SHOW AND CONVENTION – August 25-28.
* At Sports Arena and Hollywood Park. Apply, Western Electronic Show and Convention. 3600 Wilshire Boulevard, Suite 1920 Los Angeles, California.

CHICAGO: NATIONAL ELECTRONICS CONFERENCE AND EXHIBITION – October 19-21.
* At McCormick Place. Apply, National Electronics Conference Inc. 228 La Salle Street, Chicago, Illinois.

Engineering, machinery, machine tools

SYDNEY: 6TH BIENNIAL SYDNEY INTERNATIONAL ENGINEERING AND INDUSTRIAL EXHIBITION – July 13-18.
† At the R.A.S. Showgrounds. Apply, Industrial and Trade Fairs Ltd., Commonwealth House, 1-19 New Oxford Street, London, W.C.1. (Tel. Chancery 9011).

SEATTLE: MATERIAL HANDLING INSTITUTE SHOW – September 22-24.
* Apply, Material Handling Institute, One Gateway Center, Pittsburgh 22, Pennsylvania.

CHICAGO: CONVENTION AND EXHIBITION OF THE NATIONAL AUTOMATIC MERCHANDISING – October 17-20.
* Apply, National Automatic Merchandising Association, 7 South Dearborn Street, Chicago 3, Illinois.

PHILADELPHIA: AMERICAN SOCIETY FOR METALS, EXPOSITION AND CONGRESS – October 19-23.
* Apply, American Society for Metals, Metals Park, Novelty, Ohio, U.S.A.

TOKYO: JAPAN INTERNATIONAL MACHINE TOOL FAIR – November 9-20.
Apply, Tokyo International Trade Fair Commission, c/o Tokyo-To Denki Kenkyujo Building No. 5, 2-chome, Yurakucho, Chiyoda-ku, Tokyo.

Fancy goods, gifts, toys, hobbies

LOS ANGELES: GIFT SHOW – July 26-31.
* Apply, Trade Shows Ltd., 3510, Council Street, Los Angeles 4 California.

CHICAGO: GIFT SHOW – August 2-8.
* Apply, Eastern Manufacturers & Importers Exhibit Inc. 220 5th Avenue, New York 1, N.Y.

NEW YORK: NATIONAL JEWELLERY TRADE SHOW – August 16-20.
* At the New York Hilton Hotel. Apply, Jewellers of America Inc., 711 Fourteenth Street, N.W. Washington 5, D.C.

MONTREAL: THE FALL GIFT SHOW – August 24-27.
* Apply, National Gift Shows, Seccombe House, 443 Mount Pleasant Road, Toronto 7, Ontario.

TORONTO: THE FALL GIFT SHOW – September 28-October 1.
* Apply, National Gift Shows, Seccombe House, 443 Mount Pleasant Road, Toronto 7, Ontario.

Hotel, restaurant, catering and foodstuffs

LOS ANGELES: PACIFIC FINE FOODS AND BEVERAGE FAIR – July 19-22.
* At Biltmore Hotel. Apply, Mr. T. Dohl, 168 South Avenue, Pasadena, California.

NEW YORK: NATIONAL FANCY FOOD AND CONFECTION SHOW – August 16-19.
* At the Coliseum. Apply, Charles Snitow Organisation, 331 Madison Avenue, New York, 17, N.Y.

Leather, Footwear

CHICAGO: NATIONAL SHOE FAIR – October 11-14.
* Apply, Mr. J. P. Gibbons, Hotel New Yorker, Room 1929, Eighth Avenue at 34th Street, New York City, N.Y.

Medical

TORONTO: ANNUAL CONVENTION AND EXHIBITION OF THE ONTARIO HOSPITAL ASSOCIATION – October 26-28.
* Apply, Director of Public Relations, Ontario Hospital Association, 24 Ferrand Drive, Toronto (Don Mills) Ontario.

Motor transport

LOS ANGELES: INTERNATIONAL AUTOMOBILE SHOW – October 23-November 2.
* Apply, Los Angeles Motor Car Dealers' Association, 8721 Sunset Boulevard, Los Angeles 69 California.

Office equipment and business efficiency

TORONTO: CANADIAN NATIONAL BUSINESS SHOW – September 29-October 1.
* Apply, Grant Smedmor Ltd., Canadian National Business Show 1819 Yonge Street, Toronto 7, Ontario.

Packaging

LOS ANGELES: WESTERN PACKAGING EXHIBITION – July 21-23.
† Apply, Clapp & Poliak Inc., 341 Madison Avenue, New York 17, N.Y.

TORONTO: NATIONAL PACKAGING EXPOSITION – November 3-5.
† Apply, Packaging Association of Canada, 25 Merton Street, Toronto 7, Ontario.

Stationery and Printing

ST. LOUIS: PRINTING INDUSTRY OF AMERICA CONVENTION AND EXHIBITION – September 20-26.
* At Hotel Chase Park Plaza. Apply, Printing Industry Educational Exhibits Corporation, Printing Industry of America Headquarters Building, 20 Chevy Chase Circle N.W. Washington 15, D.C.

CHICAGO: STATIONERY AND OFFICE EQUIPMENT EXHIBITION – September 26-29.
* Apply, National Stationery and Office Equipment Association, 740 Investment Building, Washington 5, D.C.

1965: General

ACCRA: GHANA INTERNATIONAL TRADE FAIR – February 3-21.
Apply, Ghana International Trade Fair, Ministry of Trade, P.O. Box M 47, Accra, Ghana.

MELBOURNE: THIRD AUSTRALIAN INDUSTRIES FAIR – March 4-20.
Apply, General Manager The Victorian Chamber of Manufactures, Manufacturers' Building 312 Flinders Street, Melbourne CI Australia.

JOHANNESBURG: RAND EASTER SHOW – April 6-19.
* Apply, Witwatersrand Agricultural Society, P.O. Box 4344, Johannesburg.

TOKYO: SIXTH INTERNATIONAL TRADE FAIR–April 16-May 5.
† Apply, Tokyo International Trade Fair Management Office, G.P.O. Box 1201, Tokyo, Japan.
TOKYO: BRITISH EXHIBITION, – September 17-October 3.
Apply, British Overseas Fairs Ltd., 21 Tothill Street, London, S.W.1. (Tel: ABBey 6376).
LIMA: PACIFIC INTERNATIONAL TRADE FAIR – October 30-November 14.
† Apply, Pacific International Trade Fair, P.O. Box 4900 Lima, Peru.

1965: Specialized

Agricultural, Fishing, Dairy

TORONTO: CANADA FARM AND INDUSTRIAL EQUIPMENT TRADE SHOW – January 27-30.
* Apply, Canada Farm and Industrial Equipment Trade Show, 4881, Yonge Street, Willowdale, Ontario.
HONG KONG: FISHERIES EXHIBITION – February 1-6.
Apply, The Secretary 1965 Fisheries Exhibition Committee, c/o Fisheries Research Station, Aberdeen, Hong Kong.

Boats

BALTIMORE, MARYLAND: CHESAPEAKE BAY BOAT SHOW – February 4-9.
* Apply, Chesapeake Bay Boat Show, 1006, Cathedral Street, Baltimore 1, Maryland.
TORONTO: CANADIAN BOAT SHOW – February 5-13.
* Apply, Canadian Boat show, Canadian National Sportsmen's Show, 85, King Street East, Toronto 1.
LOS ANGELES: BOAT SHOW – February 19-28.
* Apply, Southern California Marine Association Inc., 630, South Kenmore Avenue, Los Angeles 5, California.

Chemical

NEW YORK: CHEMICAL INDUSTRIES EXHIBITION – November 29-December 3.
† Apply, International Exposition Company, 480 Lexington Avenue, New York 17.

Engineering, machinery, machine tools

CHICAGO: INTERNATIONAL HEATING AND AIR CONDITIONING EXHIBITION – January 25-28.
† Apply, International Exposition Co. Inc., 480 Lexington Avenue, New York 17, N.Y.
DETROIT: NATIONAL PLANT ENGINEERING AND MAINTENANCE SHOW – March 8-11.
* Apply, Clapp & Poliak Inc. 341 Madison Avenue, New York 17, N.Y.
CLEVELAND: ASTME TOOL EXPOSITION – March 29-April 2. At Public Auditorium.
* Apply, American Society of Tool and Manufacturing Engineers, 10700, Puritan Avenue, Detroit 38, Michigan.
TORONTO: NATIONAL PRODUCTION SHOW OF CANADA – May 3-7.
† Apply, Show Manager, Production Show '65, Industrial and Trade Shows of Canada, 481 University Avenue, Toronto 2, Ontario.
NEW YORK: DESIGN ENGINEERING SHOW – May 17-20.
* Apply, Clapp & Poliak Inc. 341, Madison Avenue, New York 17, N.Y.
MELBOURNE: 7TH BIENNIAL MELBOURNE ENGINEERING INDUSTRIAL AND MACHINE TOOLS EXHIBITION – August 9-14. At Exhibition Buildings .
† Apply, Industrial and Trade Fairs Ltd., Commonwealth House, 1-19, New Oxford Street, London, W.C.1. (Tel: Chancery 9011).
CHICAGO: PRODUCTION ENGINEERING SHOW – September 21-October 1.
* Apply, Clapp & Poliak Inc. 341, Madison Avenue, New York 17, N.Y.
ATLANTIC CITY: INTERNATIONAL TEXTILE MACHINERY EXHIBITION – September 26-October 2.
Apply, American Textile Machinery Association P.O. Box 96 Vienna, Virginia.
CHICAGO: PACKAGING MACHINERY SHOW – November 2-5.
† Apply, International Exposition Company, 480, Lexington Avenue, New York 17.

Fancy goods, gifts, toys, hobbies

CHICAGO: HOBBY INDUSTRY TRADE SHOW – January 31-February 4.
* Apply, Mr. W. L. MacMillan, Hobby Industries Association, 200, Fifth Avenue, New York 10.
NEW YORK: INTERNATIONAL TOY AND TRADE FAIR – March 7-12. At Hilton Hotel.
* Apply, International Trade Shows, 545, Fifth Avenue, New York 17, New York.

Homes, household goods and hardware

ATLANTIC CITY: CHINA AND GLASS SHOW – January 6-10.
* Apply Little Brothers Shows Inc. 220, Fifth Avenue, New York 1, New York.
CHICAGO: NATIONAL HOUSEWARES EXHIBITION – January 11-15.
* Apply, National Housewares Manufacturers' Association, 1130, Merchandise Mart, Chicago 54, Illinois.
TORONTO: CANADIAN HARDWARE SHOW – February 8-11.
* Apply, Canadian Retail Hardware Association, 290, Merton Street, Toronto 7, Ontario.

Motor transport

NEW YORK: NATIONAL AUTO ACCESSORIES EXHIBITION – February 1-4.
* Apply, Automotive Accessories Manufacturers of America. One Bala Avenue. Bala, Cynwyd, Pennsylvania.

Packaging

CHICAGO: NATIONAL PACKAGING EXHIBITION – April 5-8.
* Apply, Clapp & Poliak Inc. 341, Madison Avenue, New York 17, N.Y.

Sports

CHICAGO: NATIONAL SPORTING GOODS SHOW – January 31-February 4.
* Apply, The Secretary, National Sporting Goods Association, 23, East Jackson Boulevard, Chicago, Illinois.
SAN FRANCISCO: NATIONAL SPORTS AND BOAT SHOW – February 5-14.
* Apply, National Boat Show, 325, Pacific Avenue, San Francisco 11, California.
MONTREAL: CANADIAN SPORTS AND CYCLE ASSOCIATION SHOW – February 15-19.
* Apply, Canadian Sports Goods and Cycle Association, 11580, Poincare Street, Montreal P.Q.

Lord Drumalbyn (second right) Minister of State, Board of Trade, examining a Thornycroft marine engine on the stand of the Leyland Motor Corporation, Special Products Division, at the recent Hanover Fair.

PUBLICITY OVERSEAS FOR UK TRADE FAIRS

Organisers of Trade Fairs and Exhibitions in the United Kingdom are reminded that they are welcome to send posters and brochures about their Trade Fairs to Official British Commercial Representatives Overseas, who are always anxious to publicise such events.

But Commercial Representatives must receive material on events **well in advance**—*two clear months is a minimum notice—and they should be sent a reasonable number of brochures and posters for distribution. Two or three dozen copies for the Commercial Representatives in each area it is desired to cover should be considered an absolute minimum. A full list of British Commercial Representatives Overseas, together with their addresses, is published every three months in the* Board of Trade Journal.

Publicity material for Commercial Representatives in more distant countries should be despatched **by air-mail,** *since delivery to some countries by surface mail can take up to two months.*

The Commercial Representatives should be told whether the publicity material sent to them is receiving any separate distribution in the country concerned.

Overseas Trade and Exports

British TC's in Canada praised by Scottish businessmen

Mr. T. D. Bruce, leader of the recent Scottish Trade Mission to Canada, writes about the very warm welcome they received throughout the whole of Canada during a nearly three weeks visit made in May. With economic activity still expanding, Canada offers increased opportunities to British exporters.
The Board of Trade warmly commends the Council of Scottish Chambers of Commerce on making this visit and would be pleased to give guidance to any other organisation planning similar visits.

In the autumn of last year at a meeting of the Council of Scottish Chambers of Commerce, the Edinburgh Chamber stated that they hoped to arrange a visit to Canada in return for visits that they had received from Vancouver and Halifax delegations. They offered an open invitation to all Scottish Chambers of Commerce to join their party and make it a really representative one of Scotland. Within a short time, the response from many Chambers was so satisfactory that planning at once started for a two-week visit to Canada, and the Mission was then organized officially under the aegis of the Council of Scottish Chambers of Commerce. We had representatives from the North and the South and the East and the West of Scotland, covering traditional Scottish goods such as haggis, shortbread and whisky, textiles and industrial instruments, and four representatives from Scottish Banks.

Contacts were made in Canada with Chambers of Commerce, in many cases known as Boards of Trade in that country, Trade Commissioners and banks, notifying them that we intended to visit Montreal, Toronto, Vancouver and Halifax, Nova Scotia, and providing full lists of the delegates with their business and objectives clearly outlined, and it was left to these three aforementioned bodies to co-ordinate.

Parties visiting Montreal and Toronto should allow four or five days for a visit to each of these towns; our stay of two days in each were too short and prevented us making as many business calls as we should have done.

The civic authorities also took a great interest in us, and in practically every town that we visited a civic reception was arranged and again, of course, we made very valuable contacts.

Many of the party which consisted of over forty businessmen, along with eight ladies, did a considerable amount of business and in some instances far ahead of their expectations. Others who did not expect to do export were looking for fresh goods for import, and still others who were more in the British home trade were able to see modern methods and practices that could be applied in their own business.

Hospitality to everyone was almost beyond description. Not only did we have receptions from all the aforementioned bodies, but practically everyone of the party was invited to private homes to have friendly chats, partly on business, partly on politics – which were handled very diplomatically, and of course the natural exchange of the usual domestic conversation on families and education.

We were all impressed by the Canadian standard of hygiene in hotels, restaurants and cafeterias. Traffic in all these cities and in the country seemed to be very highly disciplined with a greater degree of courtesy than we have in this country.

One must not discriminate, but the return hospitality that was given from Vancouver and Halifax was really exceptional. They wanted to show us everything and would hardly let us lift a finger to do anything for ourselves. We had, of course, in both these areas a longer time than in the other towns mentioned, and this probably helped a great deal.

The only criticism that we had was from towns that we did not visit, as an official delegation, and we learned that these are very important for business visits today, they are such rapidly growing cities, namely Winnipeg, Regina, Edmonton and Calgary. In the last-named town, we had three and a half hours between plane and train, and in that short time the enthusiasm of the members of the Board of Trade (Chamber of Commerce in other words) was such that they provided cars driven by their own members who took us everywhere that we wanted or where they wished us to see their very rapid development. It is quite apparent that a visit of businessmen from this country must on future occasions make a point of visiting these cities. The development has to be seen to be believed. Three of our number visited Winnipeg for a day and received a great welcome from businessmen there.

Altogether the two to three weeks' tour was of the greatest success. Good business has been reported, some large orders taken, agents appointed and the Canadians seemed to appreciate our visit to a very high degree; it should be followed up in a reasonably short time either by another mission or by individual businessmen otherwise Canada will again feel they have been left in the lurch.

May I give the greatest praise to the excellent work that the Trade Commissioners are doing in that country, and although all the other bodies did a tremendous amount for us, without the first class, enthusiastic and devoted services provided by Trade Commissioners the visit would not have been half the success that it turned out to be.

In closing, as leader of the party, I would like to give every credit to our organizing secretary, Mr. W. V. Stevens of the Edinburgh Chamber of Commerce, for the excellent work he did, and also for the splendid support I got from every member of the party.

'THE COMMONWEALTH: Some Economic Questions'

The July issue of the *BULLETIN FOR INDUSTRY* contains articles on UK trade with the Commonwealth; UK investment in the Commonwealth; and UK assistance for Commonwealth development.

The *BULLETIN*, prepared by the Information Division of the Treasury, is circulated free of charge to addresses in the United Kingdom. It can be obtained from: Circulation Section, Central Office of Information, Hercules Road, London, S.E.1. Please quote reference number BJ(2) in your letter.

Trading with Italy

Board of Trade Journal Supplement

Are you members of the British Chamber of Commerce for Italy?

We are the only Chamber of Commerce whose prime function is the promotion of British interests in the Italian market. No other Chamber of Commerce does exclusively this.

Our expanding staff in Milan and our representation throughout the main cities of the Peninsula are constantly at the disposal of our Members.

There remains, still unexploited, an immense potential for British goods in Italy. Whether your products are already on sale in Italy or whether you have not yet considered this country as a potential customer we can help you, as a Member, to establish new openings and develop new opportunities in this market.

We can help with all manner of advice and information about market conditions and possibilities. We can arrange your introductions, establish your contacts, provide interpreters, help with itineraries, fix your accomodation and, in general, so back your efforts that every minute you spend in Italy will count.

If you have, or would like to have business relations with Italy, you will find the services of this Chamber invaluable. The Secretary General will be happy to let you have details about membership.

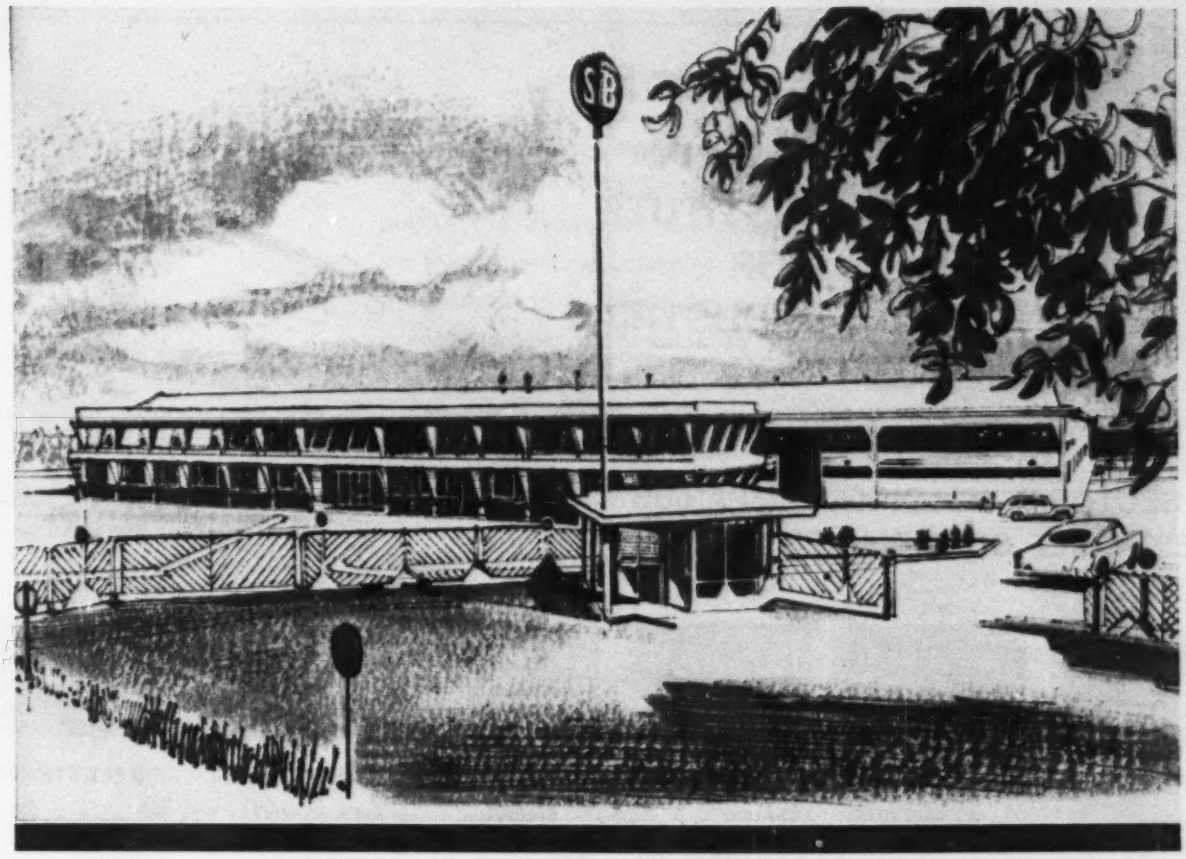
BRITISH CHAMBER OF COMMERCE FOR ITALY; Via Tarchetti 1/3, Milan.

Name: .....

Company .....

Address: .....

Please send particulars of how to register as a Member.



SUPERBOX S.p.A.

A Packaging Service in Italy

Superbox S.p.A. offers to manufacturers in Italy a wide packaging service with processed food cans, metal containers, plastic bottles, plastic cups and White caps ("Twist-Off" and "Pry-Off"). The facilities include a mobile bacteriological laboratory geared to give immediate on-the-spot attention to our customers throughout Italy. There is also an extensive machinery service department, and a design and development studio upon which our customers can call for advice.

SUPERBOX S.p.A., CASELLA POSTALE 480, FLORENCE.

IRI

Rome, via veneto, 89

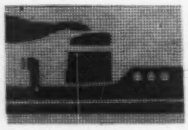
INSTITUTE FOR INDUSTRIAL RECONSTRUCTION

IRI SECTORAL HOLDING COMPANIES AND THEIR CHIEF SUBSIDIARIES

STET

STIPEL
TELVE
TETI
TIMO
SET
SIT SIEMENS

Urban and interurban telephone services. With 300,000 new subscribers in 1962, the five companies of the STET group have now reached the 3,640,000 marks. 297 million of a total of 484 million long-distance calls handled in 1962 were automatic. Length of STET urban circuits: 7 million and 750,000 km. Length of STET extra-urban circuits: 1 million and 900,000 km.



FINMARE

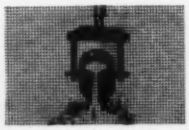
ITALIA
LLOYD TRIESTINO
TIRRENIA
ADRIATICA

Shipping lines serving Mediterranean ports, North and South America, Africa, the Far East and Oceania. Finmare subsidiaries operate 62 per cent of the nation's passenger and mixed passenger-cargo capacity and 9 per cent of its dry cargo tonnage. In 1962 the four companies carried more than two million passengers and more than two million tons of goods.

FINCANTIERI

ANSALDO
CRDA
NAVALMECCANICA
OARN
ARS. TRIESTINO
SEBN
OCRN DI TARANTO

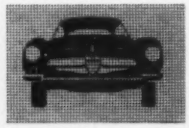
Fincantieri shipyards account for more than 80 per cent of Italian shipbuilding capacity and, apart from ships of all types and sizes, make ships motors, cranes and other engineering products. In 1962, Ansaldo, CRDA (Cantieri Riuniti dell'Adriatico) and Navalmeccanica launched three transatlantic liners and 11 other units of a combined capacity of 256,000 GRT, as well as a 5,000-ton cruiser for the Navy.



FINSIDER

ITALSIDER
DALMINE
TERNI
BREDA SIDER.
CEMENTIR
FERROMIN
SANAC
CMF
SOPREFIN

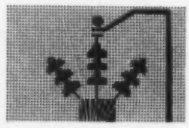
Production of pig iron, steel, tubes, plates, sections, structural steel, cement, etc. Finsider subsidiaries produce 90 per cent of Italy's pig iron, 56 per cent of its steel and 11 per cent of its cement output. Annual production figures in 1962 were 3.3 million tons pig iron, 5.4 million tons steel, 4.2 million tons hot-rolled and 500 thousand tons cold-rolled products.



FINMECCANICA

ALFA ROMEO
ANSALDO
S. GIORGIO
IMAM AERFER
FAMIND
SALMOIRAGHI
MECFOND
OTO MELARA
NUOVA S. GIORGIO
DELTA
S. EUSTACCHIO
SAFOG
S. GIORGIO PRA
SELENIA

Motor vehicles and coach-work, aircraft, railway rolling stock, machine tools, electrical machinery and appliances, electronic equipment, optical instruments, etc. In 1962 Finmeccanica companies reported a combined sales figures equivalent to about $300 million, booked orders worth more than $335 million and took on some 5,000 additional workers.



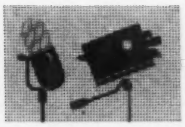
FINELETTRICA

SIP
SME
TRENTINA
TERNI
UNES
SENN

Power generation and distribution. Finelettrica companies produce 26 per cent of the nation's electricity and in 1962 supplied more than 18.1 million Gwh.
New power stations added 195 MW to the group's active and installed power in 1962 and 144 Gwh to its total generating capacity. The 1962 electricity nationalization law will terminate all IRI's technical and financial commitments in this sector.

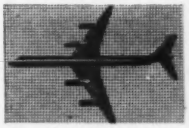
The autonomous government agency responsible for the control and management of the largest Italian industrial group. IRI companies put at the service of the nation's economic and social development all their far-flung activities, ranging from steelmaking to motor car production, from shipbuilding to telephone services, from highway construction and operation to shipping and air transport, from radio and television to vocational training.

COMPANIES UNDER DIRECT IRI CONTROL



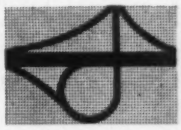
RAI-TV

Radio and television. The company greatly increased its frequency modulation network in 1962 and the second TV channel now reaches 70 per cent of the population through 42 transmitters. The overall number of RAI-TV subscribers had reached about 9 million by the end of 1962; TV subscribers alone increased in 1962 by 600,000 to about 3.4 million.



ALITALIA

Alitalia's air fleet operates a network of 156,000 km and serves all continents. In 1962 the company carried some two million passengers – 500,000 more than the year before – and inaugurated the following new services: Milan-Genoa-Alghero-Cagliari; Rome-Bari-Tirana; Rome-Leopoldville-Johannesburg; Rome-Teheran-Karachi-Bombay-Bangkok-Hong Kong-Tokio; Rome-Milan-Montreal-Chicago.



AUTOSTRADE

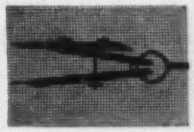
Under a 1962 agreement with the government IRI assumed responsibility for the construction and improvement of 2,200 km of toll roads and for their subsequent operation during 30 years. The Rome-Naples leg of the Autostrada del Sole was opened to traffic in 1962 and work continued on the Florence-Rome section. Construction of the Naples-Bari road was begun and improvements carried out on the Florence-Pisa and Milan-Lakes roads.

BANCA COMMERC.
CREDITO ITALIANO
BANCO DI ROMA
BANCO S. SPIRITO

Banks of the IRI Group in 1962 had a 20 per cent share of all bank deposits in Italy, handled two thirds of all non-government bond issues on the Italian capital market and financed about half of all foreign trade and financial transactions.

CELDIT
SAIVO
COTONIERE MERID.
FABBRICONE
MONTE AMIATA

A miscellaneous group of companies producing cellulose and paper, glass and refractory materials, cotton and woollen piece goods, mercury, etc.



IFAP

A staff training company for the IRI Group as a whole, which operates six workers' vocational training centres in different regions of Italy, arranges special courses for foremen and executive staff at intermediate levels, and entertains a Higher Business Administration School for the study of top-level management functions.

BANCA NAZIONALE DEL LAVORO
AND SPECIAL SECTIONS

Head Office—Rome—Via Vittorio Veneto, 119

Capital, Reserves and special funds: Lire 77,884 Million (£44 Million)

after approval of the balance sheet at end 1963 and allocation to reserves

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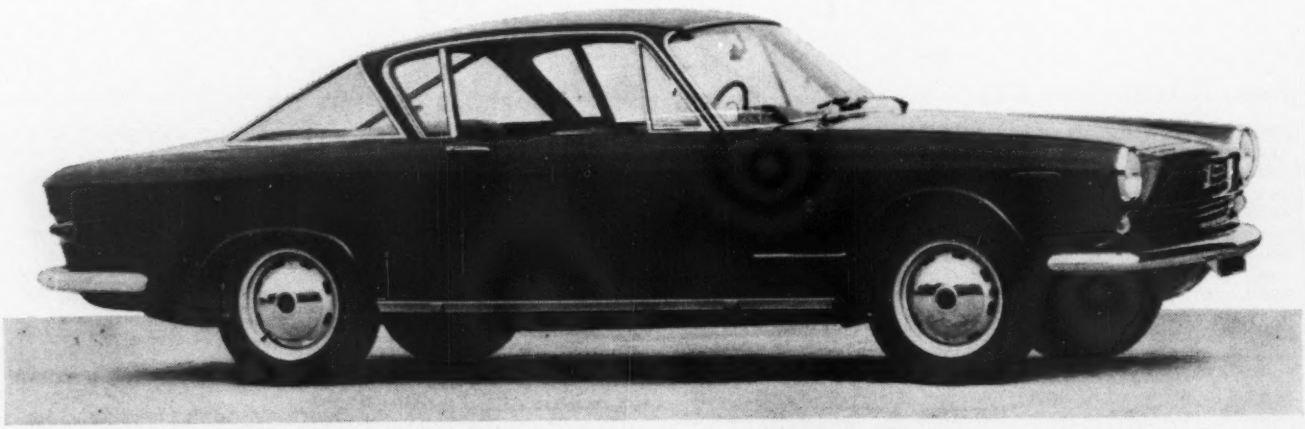

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✦

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ALL BANKING, STOCK AND FOREIGN EXCHANGE TRANSACTIONS

Payment and Sale Service of Travellers' Cheques and Letters of Credit

ISTITUTO MOBILIARE ITALIANO

Rome

Subscribed Capital and Reserves: 122 billion Lire
Loans outstanding as of March 31, 1964: 1,052 billion Lire
Bonds in circulation as of March 31, 1964: 1,399 billion Lire

The Istituto Mobiliare Italiano (I.M.I.), founded in 1931, is Italy's largest institution extending medium- and long-term credit to industrial and service enterprises.

I.M.I. is a 'public – law entity', i.e. an organization with a legal status enabling it to effectively combine its public-interest function with the private-enterprise character of its operations. It is a legal person with autonomous management.

The Institute's purpose is to contribute to the development and strengthening of the Italian economy by carrying out credit and financial transactions in general. I.M.I. credit facilities are available to all Italian industrial firms on sound investment projects regardless of the industrial sector, the size of the enterprise, its type of activity or the legal form under which it is organized.

During the last few years, I.M.I. has intensified its activities in the sector of credit at special terms and conditions, assisted by Government contribution on interest, to small and medium industrial enterprises and to new enterprises established in Southern Italy; and a major role is also played by I.M.I. in the field of term financing of export of capital goods.

In 1962 I.M.I. also established an Autonomous Section for Maritime Credit (Credito Navale – Sezione Autonoma dell'Istituto Mobiliare Italiano) whose capital stock is owned 51% by I.M.I., the balance being held by other public-law credit institutions and banks of national interest.

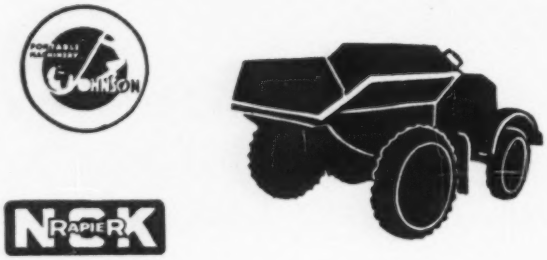
I.M.I.'s loans are available to foreign concerns making productive investments in Italy.

I.M.I.'s major source of funds is the issue of debentures on the Italian market, which have become very popular with savers and investors.

I.M.I. has also raised funds abroad, by floating bonds on the Swiss market and contracting loans with U.S. and European banks.

The loans outstanding increased from 532 million Lire at the end of the first fiscal year to 1,399 billion Lire at March 31, 1964, with a 20% average compound annual increment rate on constant values; they account now for about 35% of the total amount loaned by all special industrial and public-works credit institutions.

The Istituto Mobiliare Italiano has its Head Office in Rome, Via delle Quattro Fontane, 121;
Nine Regional Offices in Italy:
Milan, Turin, Genoa, Padua, Venice, Florence, Bari, Naples, Catania, and four Representative Offices in Washington, Zurich, Brussels and Mexico City.



tutte
le macchine
edili
e stradali
per cave
e miniere

INTERNATIONAL ENGINEERING EQUIPMENT
SOCIETA ITALIANA PER AZIONI
IEE
ROMA CORSO VITTORIO EMANUELE 142
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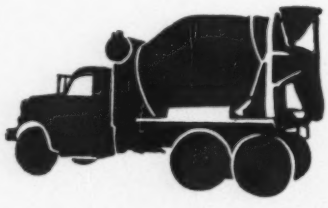


interpellateci per ogni vostra esigenza

TRADE WITH ITALY IS BOOMING

In the last ten years the Italian economy has successfully entered the "big league" of International Trade. In addition to her traditional products, Italy is now offering trading partners an ever increasing number of products ranging from high fashions to printing-presses, from high quality shoes to automobiles. This also applies to trade between Italy and Great Britain. Figures just published show a startling increase for the first quarter of this year. Here are some examples—they are taken as the percentage increase in the first three months of 1964 compared to the same period for 1963.

Petro-chemicals	44%
Chemicals	195%
Plastics	59%
Cars	77%
Textiles	35%
Machine Tools	92%
Electrical Machinery	113%

In 1963 alone British exports to Italy were nearly 18% greater than 1962.

British businessmen are urged to take full advantage of such a favourable trend. To do so they should first of all contact the Italian Trade Centre, where a very intensive programme of monthly Exhibitions, open only to the trade, are held.

Information regarding trade opportunities with Italy and/or forthcoming exhibitions at the Italian Trade Centre, can be obtained from:

THE ITALIAN INSTITUTE FOR FOREIGN TRADE
31 OLD BURLINGTON STREET, LONDON, W.1 TEL. REGENT 2411

Messages from the Rt. Hon. Edward Heath, M.P., Secretary of State for Industry, Trade and Regional Development and Signor Bernardo Mattarella, Italian Minister of Foreign Trade

Britain has benefited for many centuries from strong links, both cultural and economic, with Italy. At no time have these been so strong as they are now. It is the earnest wish of both countries that trade in each direction should increase as much as possible. The purpose of this Supplement is to point to ways in which this can be done.

Italy is now experiencing a second Industrial Revolution which is transforming the Italian economy. This has conferred on our two countries a double benefit. It has created a greatly increased market for British goods and it has enabled Italy to send us many of her new industrial products in addition to her more traditional exports.

The rapid expansion of the Italian economy has recently led to difficulties which may place some temporary restraint on the growth of Britain's exports to Italy, but I am entirely confident about the long-term prospects for trade between the two countries.

British exports to Italy have more than doubled since 1959 and I am sure that if we make the most of all the growing opportunities Italy, already our fifth best customer in Europe, will become an even more valuable trading partner.

I hope this Supplement will prove helpful to existing exporters to Italy and will point the way to others who are not yet familiar with this market. The services of the Board of Trade and of the British commercial and consular officers in Italy are freely available to help British firms.

I wish every success to all who do business with Italy.

The development of Anglo-Italian trade, which has more than doubled in value in the last six years, clearly shows that there is considerable scope for the marketing of British goods in Italy, and demonstrates the interest with which Italian products are received on the British market. These developments are a result of the policy of liberalization which has been pursued for a considerable time in the trade relations between the United Kingdom and Italy.

With regard to Anglo-Italian trade in 1963, there has been a marked increase in British exports, while Italian exports have fallen slightly, owing chiefly to the decrease in agricultural exports for seasonal reasons.

The Italian Government is at present taking action to promote the export of Italian products to the United Kingdom, because we feel convinced of the need to maintain the necessary balance in the trade between the two countries, not by limiting imports, but by increasing exports.

In fact we intend to stimulate the interest of the British market in our merchandise by presenting an even wider range of our products, which, we think, can bear comparison with anything manufactured in any country in the world.

However, in taking this action, we are counting on the understanding of the British authorities, for there can only be a successful development of trade between the United Kingdom and Italy in a climate of mutual collaboration.

Per molti secoli la Gran Bretagna ha beneficiato degli stretti vincoli, sia culturali che economici, che l'hanno unita all'Italia. In nessun momento della sua storia questi vincoli sono stati saldi come oggi. È vivo desiderio di entrambi i paesi che gli scambi nei due sensi aumentino il più possibile e lo scopo di questo supplemento è di indicare il modo in cui ciò può avvenire.

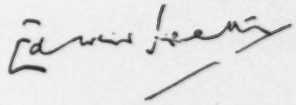
In Italia è oggi in corso una seconda Rivoluzione Industriale che sta trasformando l'economia italiana. Ciò ha dato ai nostri due paesi un duplice beneficio: ha creato un mercato molto più vasto per le merci britanniche ed ha permesso all'Italia di inviarci molti dei suoi nuovi prodotti industriali in aggiunta alle sue esportazioni tradizionali.

La rapida espansione dell'economia italiana ha recentemente provocato delle difficoltà che potranno porre un freno temporaneo all'incremento delle esportazioni britanniche in Italia, ma nutro piena fiducia nelle prospettive a lungo termine del commercio fra i nostri due paesi.

Le esportazioni britanniche in Italia sono più che raddoppiate dal 1959 e sono certo che se sapremo trarre il massimo profitto da tutte le crescenti possibilità che si offrono, l'Italia, che già occupa il quinto posto fra i nostri migliori clienti in Europa, potrà assorbire una quota anche maggiore delle nostre esportazioni.

Spero che questo supplemento si dimostrerà utile per coloro che già esportano in Italia e servirà da guida agli altri che ancora non hanno familiarità con quel mercato. I servigi del Board of Trade e dei funzionari degli uffici commerciali e consolari britannici in Italia sono a disposizione per aiutare gratuitamente le ditte britanniche.

Auguro il massimo successo a tutti coloro che sono in rapporti d'affari con l'Italia.



Lo sviluppo dell' intercambio italo-britannico, più che raddoppiato in valore negli ultimi sei anni, dimostra chiaramente le ampie possibilità di collocamento che le merci del Regno Unito trovano in Italia ed il notevole interesse che i prodotti italiani suscitano nel mercato britannico. Questi risultati sono la conseguenza della politica di liberazione degli scambi che i due Paesi perseguono da lungo tempo.

Per quanto riguarda in particolare l'andamento degli scambi nel 1963, va rilevato che a fronte di un sensibile incremento delle esportazioni del Regno Unito verso l'Italia, le esportazioni italiane hanno segnato una certa riflessività, fenomeno questo imputabile in parte alla contrazione delle nostre esportazioni agricole per motivi di carattere stagionale.

Il Governo italiano sta attuando in questo momento tutta un'azione per favorire il collocamento sul mercato britannico dei nostri prodotti anche perchè esso è convinto della necessità di assicurare all'intercambio tra i due Paieso il necessario equilibrio non già mediante il contenimento delle importazioni ma sviluppando le esportazioni.

Intendiamo infatti sollecitare adeguatamente l' interesse del mercato britannico per le merci italiane con una sempre più attiva e larga presentazione delle nostre produzioni, che si può ben dirlo, reggono il confronto con quelle similari di tutti gli altri Paesi.

Tuttavia in questa nostra azione contiamo anche sulla comprensione delle Autorità britanniche, perchè solo un clima di mutua collaborazione può consentire un armonioso sviluppo dell'intercambio tra l'Italia ed il Regno Unito.

Trading with Italy

BOARD OF TRADE JOURNAL SUPPLEMENT, 3 JULY, 1964

British Embassy and Consulates

British Embassy Villa Wolkonsky, Via Conte Rosso 25, Rome (Tel. 776551)	*Hours* 9 a.m.-1 p.m. 2.30 p.m.-6 p.m. Saturday closed
British Consulate-General Via Fieschi 8-12, Genoa (Tel. 564833)	9 a.m.-12.45 p.m. 2.45 a.m.-5.30 p.m. Saturday 9 a.m.-12
British Consulate-General Via Gabba 1/A, Milan (Tel. 862486)	9 a.m.-12.30 p.m. 3 p.m.-6 p.m. Saturday 9 a.m.-12.30 p.m.
British Consulate-General Via F. Crispi 122, Naples (Tel. 385641)	9 a.m.-1 p.m. 3 p.m.-5.30 p.m. Saturday 9 a.m.-1 p.m.
British Consulate Lungarno Corsini 2, Florence (Tel. 272594)	9 a.m.-12.30 p.m. 4 p.m.-6 p.m. Saturday 9 a.m.-12
British Vice-Consulate Pal. I.N.A., Via I Settembre 54, Messina (Tel. 210135)	8.30 a.m.-12.30 p.m. 3 p.m.-6 p.m. Saturday 9 a.m.-12
British Consulate Via Marchese di Villabianca 9, Palermo (Tel. 253366)	9 a.m.-1 p.m. 2.30 p.m.-5 p.m. Saturday 9 a.m.-12
British Consulate Piazza di Spagna 16, Rome (Tel. 689413)	8.30 a.m.-12.30 p.m. 3.30 p.m.-5.30 p.m. Saturday closed
British Consulate Via Bogino 31, Turin (Tel. 546908)	9 a.m.-12.30 p.m. 3 p.m.-6 p.m. Saturday 9 a.m.-12
British Consulate Accademia 1051, Dorsoduro, Venice (Tel. 27408)	9 a.m.-12.30 p.m. 3 p.m.-5.30 p.m. Saturday 9 a.m.-12.30 p.m.
Hon. British Consulate Via Rossini 2, Trieste (Tel. 24590)	9 a.m.-1 p.m. 3.30 p.m.-5.30 p.m. Saturday 9 a.m.-12.30 p.m.

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FRONT COVER PICTURES

The illustrations on the cover of this supplement show (reading from the top downwards): British excavators made by J. C. Bamford (Excavators) Ltd., at work on the new Montecatini factory under construction at Rome; Sunbeam Superleggera Venezia on show in Venice; Crestliner Explorer, powered by a 47 s.h.p. Perkins 4.107 diesel engine with Z-drive, on a non-stop six days and nights test at Lake Como.

GERMANY
SWITZERLAND
AUSTRIA
FRANCE
LEGEND
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Natural Gas
Mercury
Atomic power station
INDUSTRIES
Iron and steel (integrated plant)
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Chemicals and synthetics
Engineering
Vehicles
Shipbuilding
Aircraft
Textiles
Paper pulp
Paper and board
Oil refining
40 0 40 80 Kms.
25 0 25 50 Mls.
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Brescia
Milan
Turin
Venice
Trieste
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Modena
Reggio
Genoa
Savona
Sestri
La Spezia
Bologna
Florence
San Marino
Leghorn
Siena
Ancona
Piombino
Grosseto
Ascoli Piceno
Terni
CORSICA (French)
ROME
Latina
Cassino
Foggia
Naples
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Potenza
Ferrandina
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Modern Italy

by J. S. Rooke, CMG, OBE, Counsellor (Commercial), British Embassy, Rome

TEN YEARS AGO, Italy was certainly not 'modern' in the sense of Galbraith's 'Affluent Society'. Per capita income was no more than £130, consumption at £100 per head was one of the lowest in Western Europe and nearly half the family budget was spent on a rather limited diet consisting mainly of pasta, rice, maize, bread and dried fruits. The basis of the economy was agriculture; four out of every ten people were employed on the land, whose produce accounted for almost one quarter of the national product. Italy, it is true, already had thriving motor vehicle, chemical and textile industries, but the development of heavy industry and the new petrochemical industries was held up for lack of domestically-produced basic materials – annual steel production stood at less than 5 million tons, domestic oil production was negligible and distribution of the new fuel, methane (natural gas) discovered in large quantities in the Po valley, was still equivalent to no more than about 2½ million tons of coal. The number of unemployed exceeded 2 millions, most of them concentrated in the depressed South. Here land reform, involving the break-up of the big estates and the allocation of small-holdings to a hitherto landless peasantry, was only just beginning to get under way. It had still not emerged from a laborious first stage – the execution of an essential infra-structure programme of re-afforestation, water conservation and irrigation and the construction of communications – and had not yet achieved any noticeable uplift in the standard of living of the population, one of the lowest in Europe. The concept of the 'two Italies' – the relatively prosperous and progressive, industrial North and the impoverished, backward and ignorant South, was a constant threat to the economic and political stability of the country.

Reform agencies

Today the two Italies in this sense no longer exist. More than two million workers have moved up from the South to the labour hungry factories of the North. But the South has by no means been abandoned. The Government reform agencies have settled well over 100,000 families on small-holdings, on generous terms for the purchase of land and buildings. They are able to buy their seeds and fertilizers and market their grapes, olives and tomatoes and other fruits and vegetables through their own co-operatives. In many places irrigation of the olive plantations has permitted the introduction of a three-crop system which has more than trebled the value of agricultural land. But increasingly the Southern farmer is turning to the use of machinery and implements to replace the labour which continues to drift from the land. Not all these workers go North. The big parastatal concerns, which between them control some 60 per cent of Italian steel production and about 20 per cent of the engineering industry, as well as the principal shipping lines and shipyards and the radio, television and telephone networks, are obliged by law to allocate 40 per cent of their new investments annually to the South. The new steel mill at Taranto will be one of the biggest in Europe when it reaches its target output figure of 6 million tons in two or three years' time. A giant petrochemicals and synthetic fibre complex has been built at Brindisi – a venture by private enterprise. Most cities of any size in the South now have 'development areas' on their boundaries, whither they are seeking to attract new industries. The industrial triangle Bari – Brindisi – Taranto may in time rival in importance that of Milan – Turin – Genoa in the North. And the former landless *bracciante* (seasonal agricultural labourer) now drives to work on his motor scooter, if not in his own small car.

Meanwhile, Italian steel production has risen to over 10 million tons annually, leaving about 5 million tons to be covered by imports. Production of methane has risen to the equivalent of 7.8 million tons of coal per year. The output of the motor vehicle industry has passed the million mark, but even so, one out of every four new cars registered in Italy has to be imported to meet the demand. Industry, not agriculture, is now the lynch-pin of the economy. Rather less than three people in every ten are now working on the land; they contribute less than one-sixth of the gross national product, and even taking into account the Government's plans for stepping-up agricultural production, this share is expected to drop even further. Earnings in industry are higher; *per capita* income is now £240, and consumption £170. Only four lire out of every ten are now spent on food, expenditure on entertainment has trebled, there are 4·2 million television subscribers and one car to every 14 inhabitants as compared with one for every 45 ten years ago. And in a very few years' time, the Italian will be able to drive his car over a network of motorways stretching from the Swiss frontier down to the toe of Italy.

Economic miracle

These are the outward and visible signs of what has become generally known as the Italian 'economic miracle'. The dictionary describes a miracle as 'an event . . . deviating from the known laws of nature . . . an extraordinary, anomalous or abnormal event brought about by superhuman agency'. In this sense Italy has experienced no miracle; the phenomenon of the dynamic upsurge in the economy, which was concentrated between the years 1959 and 1962, was the result of hard work and careful investment planning. Fortunately Italy had a pool of surplus labour on which to draw – the 2 million unemployed mentioned above. But the Italian population was growing very rapidly even before the years of the 'miracle'; between 1951 and 1961 it rose from 47.5 to 50.6 millions and it is a young population – 6 out of every 10 were under 40 in 1961. Concomitant with the rise in population was the growth in employment. There are now 2.5 million more people in jobs than there were 10 years ago and the total labour force stands at well over 20 million. Although personal consumption was rising at an average annual rate of 4·7 per cent, a large part of the increased earnings were saved and re-invested; in 1962 investments totalled £3.300 million, about 3½ times as much as in 1950, and they represented 25 per cent of gross national income as compared with 19 per cent in the earlier year. Between 1959 and 1962 the annual increase in the national income averaged more than 7 per cent. Small wonder that at the end of 1962 the index of industrial production stood at 221.7 (1953 = 100).

However, economic miracles have a disconcerting habit of re-converting their wine into water. To change the metaphor, the plant of Italian prosperity burst into a too rapid and luxuriant bloom to avoid the weeds which might choke it. Already in 1962 there were signs that the pace of production was flagging; investments were no longer rising so rapidly, the rate of increase in the national income fell back to just over 6 per cent and the hard winter of 1962-63 seriously impaired agricultural production. By 1963 the signs of 'over-heating' in the Italian economy were unmistakable. The pool of *employable* labour had shrunk, causing strain on the labour market and prompting demands for increased wages. By the end of the year, industrial salaries over the previous twelve months had risen by almost 16 per cent. The cost of living had gone up by 8·4 per cent; the rise in the first half of the year had been prompted particularly by the higher cost of foodstuffs, crops having been ravaged by the inclement weather. The shortfall in domestic food production had to be made good from imports – as indeed, had the demand for consumer goods of all kinds, set off by the increased purchasing power of the Italian wage-earner. Imports rose by 26 per cent in 1963 and it is estimated that roughly half the increase represented additional overseas purchases of foodstuffs, particularly meat, now a staple item in the Italian worker's diet. The higher prices of Italian goods deriving from higher production costs slowed down the rate of increase in Italian exports to 9 per cent, with the result that the deficit in the visible trade balance at the end of 1963 was about £860 million, twice as high as the figure for 1962.

Stabilization measures

There were other factors discouraging saving and prompting a high rate of spending. The confidence of the potential Italian investor had undoubtedly been shaken by the nationalization of the electricity industry at the end of 1962 and the introduction at the beginning of the following year of the withholding tax on dividends. His reaction was either to export clandestinely much of his capital abroad (whence it was in large part repatriated as foreign investment, but in a form which avoided the disadvantages of the withholding tax) or to sink it into real estate, building, works of art or luxury consumer goods, whose real values were likely to appreciate. In either case, it was withdrawn from the capital market at a time when Italian industry was urgently seeking funds to finance its further development and when, with profits squeezed between rising costs and the need to maintain prices at competitive levels, self-financing was becoming more and more difficult. Assistance from the banks in the shape of advances and foreign exchange borrowings (which at their peak reached £500 million) was cut off when, towards the end of 1963, the Governor of the Bank of Italy clamped on an unofficial credit squeeze and instructed the commercial banks to scale down their overseas borrowings. Thus, when the new Centre-Left Government of Sgr. Moro took over in December 1963, they were faced with a vertiginous inflationary spiral of rising costs and prices; clamorous demands for further wage increases; a tight capital market (reflected in rock-bottom Stock Exchange prices) whose grip was slowly strangling the further growth of Italian industry; a heavy deficit in foreign trade, caused primarily by steeply-climbing imports of consumer goods, which had involved Italy in a balance of payments loss of £430 million in 1963 as compared with a gain of £18 million in 1962; and – worst of all perhaps – a domestic lack of confidence in the stability of the lira as evidenced by illegal capital exports over the previous years estimated at £530 million.

At the time of writing, the Government has just promulgated a series of measures designed to meet this situation. Agricultural production is to be stimulated by further loans to farmers to facilitate the purchase of machinery, by tax reliefs, by more financial support for the reform agencies and by measures which will ultimately put an end to the antiquated system of share-cropping. (The previous government had already announced steps to encourage domestic production of meat and vegetable oils). Industry is to benefit from investment allowances and from the introduction of a system of priorities on the capital market. The rate of saving is to be stepped up – and the drain on the balance of payments eased – by making it more difficult and more expensive to buy less essential goods. A purchase tax on private cars and motor-boats is to be introduced, and the tax on petrol increased; and hire purchase sales are to be regulated. The provisions announced by the previous government for financing a programme of popular housing and increasing the turnover tax on luxury goods will doubtless remain in force. In the longer term, a five-year economic plan is to be launched with effect from January 1, 1965.

The nature of Italy's economic problem has therefore changed radically in the space of little more than five years. From a country which had remained poor for too long, she has become one which has grown prosperous too quickly. She is now lined up with many other countries in Western Europe in the task of preventing consumer expenditure from outrunning productive capacity; and in this sense, as well as in the fundamental changes in her economic structure, she has become 'modern'. Her present problem is one with which we in Britain are all too familiar, and the Italian people may not adjust themselves very easily to a programme of austerity. 1964 will in all respects be a difficult year. However, despite the shortage of investment capital, industrial production in Italy had increased in 1963 by over 8 per cent and the national income by 5 per cent. Her reserves of gold and foreign exchange, which stood at £1,235 million on December 31, 1963, are still entirely adequate and her IMF quota of $500 million is still untouched. She still has some untapped reserves of labour in the South, if she can provide the facilities for educating and training them, and the large pool of Italian labour abroad may one day flow back to the homeland if conditions of work are sufficiently attractive. Italian industry has ambitious plans for future development once the crisis of confidence is overcome and the flow of investment capital resumed. But there will in any case be scope for foreign capital and investment goods, as there will be a continuing need for imports of consumer goods to keep down prices on the home market. The plans of Italian industry for future growth, the expanding and changing pattern of consumer needs and the opportunities they offer for British exports are the subject of a separate article.

Modern Italy

Resident population in age groups
(Census of October 15, 1961)

Under 6 years	5,041,096
From 6-14 years	6,508,530
From 14-65 years	34,246,877
Over 65 years	4,827,066
Total	50,623,569

Per capita income during 1962.	419,900 Lire
Total number of motor-vehicles in circulation	3,535,551
Number of persons per vehicle	14·4
Total number of television sets.	4,160,232
Number of persons per set	12·2
Production of electric power in 1963	68,632 million K.W.H.

Italian imports and exports in 1963

Total imports	4,711,994 million Lire
Total exports	3,154,117 million Lire
Per capita imports	93,078 Lire
Per capita exports	62,305 Lire

The present British export position

by the British Embassy, Rome

Packing forged steel rolls for export to Italy at the Sheffield works of Firth Brown Limited.

TRADE BETWEEN Britain and Italy has flourished since the earliest times. It was one of the valuable legacies left to Britain by the Romans, who mined the tin of Cornwall. A thousand years ago England was already famed for her wool but she had no cloth manufacturing industry until the 14th century. She enriched herself by exporting it, and the great centres of the cloth industry in Lombardy and Tuscany – notably Florence – established their high reputation on English wool, which is still an important export to this day. In exchange, Tuscan merchants traded with Britain in cloth, silk, spices, jewels and works of art. Among the earliest exports from Italy were marsala and oranges, the latter being used for Dundee marmalade. The City of London owes much to the financial methods introduced by the Italians, whose merchant banks are commemorated in the name Lombard Street, to this day the financial centre of the City. With the advent of the Industrial Revolution, exports to Italy from Britain assumed a new dimension and today consist of a wide range of industrial and manufactured products.

The sixties

The present decade has witnessed a marked acceleration in the value of British exports to Italy and the balance of trade has consequently moved in Britain's favour since 1961. The following table shows the annual value of these exports including, for comparison, the Italian figures:

Year	Exports from U.K.	Re-exports	Total	Imports from Italy	Difference in favour of U.K.
	in million pounds				
1958	65·0	4·4	69·4	76·8	— 7·4
1959	72·5	4·8	77·3	92·8	—15·5
1960	88·0	5·7	93·7	98·7	— 5·0
1961	114·6	8·4	123·0	102·4	+20·6
1962	138·8	9·4	148·2	112·9	+35·3
1963	163·6	11·6	175·2	110·0	+65·2

Capital goods

Various factors contributed to the expansion of exports from Britain. The generally high Italian tariff on industrial goods has been somewhat reduced by the first moves towards the Common External Tariff of the EEC, thus improving the competitive position of British goods in the Italian market relative to domestic production. But there were two more important factors. First, the investment programme of Italy's booming economy created a favourable market for machinery of all kinds. Thus, for example, machine tools, scientific instruments, heating and cooling equipment, pumps and centrifuges, construction and mining machinery, all registered gains of over £1 million in 1963.

Consumer goods

Secondly, the rapid rise in the incomes of Italian workers has created an unprecedented demand for consumer goods. This is dramatically illustrated by the figures for cars. Following liberalization at the beginning of 1962, exports of British cars almost doubled to 23,000 units (£7.9 million) and in 1963 rose by 65 per cent to 37,857 units (£13·1 million). To these must be added the local assembly of British cars, which amounted to nearly 30,000 units in 1963, representing an export of £10 million worth of bodies, chassis and frames and the greater part of £2·6 million worth of internal combustion engines. Consumer demand was also reflected in each of the last three years and especially in 1963 in increased exports of clothing and footwear (£1·7 million), wool yarns and fabrics (£3·7 million), leather and manufactures (£3 million), silver, platinum and jewellery (£3·7 million) and a 50 per cent increase in the consumption of Scotch whisky (£1·5 million). The figures in parentheses are the total value of exports in each group for 1963.

Principal British exports

The total value of British exports to Italy in 1963 rose by 17.8 per cent to £163·6 million. The following table shows the values of the main groups:

Commodity Group	Value in £ million
Non-electrical machinery	40·8
Transport equipment	25·0
Non-ferrous metals	10·7
Iron and steel	9·2
Textile fibres, unmanufactured, and their waste	8·5
Electrical machinery	8·2
Textile yarn, fabrics and made-up articles	7·7
Chemical elements and compounds	4·7
Scientific instruments, photographic and optical goods, watches and clocks	4·1
Manufactures of metal	3·9
Non-metallic mineral manufactures	3·1
Leather and leather manufactures	3·0
Chemical materials and products	2·9
Dyeing, tanning and colouring materials	1·9
Plastic materials	1·9
Crude fertilizers and crude minerals	1·8
Clothing	1·7
Beverages	1·6
Coal, coke and briquettes	1·4
Rubber manufactures	1·4
Medicinal and pharmaceutical products	1·1
Paper, paperboard and manufactures	1·1
Petroleum and petroleum products	1·0
Miscellaneous manufactures and postal parcels	6·5

(Top) The Rapier W.1800, one of the largest walking dragline excavators made by Ransomes and Rapier Ltd., Ipswich, now being erected in Southern Italy for the Italian Electricity Authority. The 1,800-ton excavator carries a 43 cubic yard dragline bucket on a 260 ft. long boom. It is controlled by one driver.
(Centre) British furniture, made by H. Morris and Co. Ltd., Glasgow. An order covering almost the firm's entire range of dining room suites, bookcases and desks was secured by Mr. Morris the managing director, following a visit to Milan in May last year.
(Lower) Ford Consul Cortina by the Greek temple in Agrigento Province, Sicily.

Comparison with other countries

By comparison with other industrial countries the following table shows that Britain's share of the total value of exports to Italy for the first ten months of last year was only 6·3 per cent, against West Germany (17 per cent), the United States (13.5 per cent) and France (9·6 per cent):

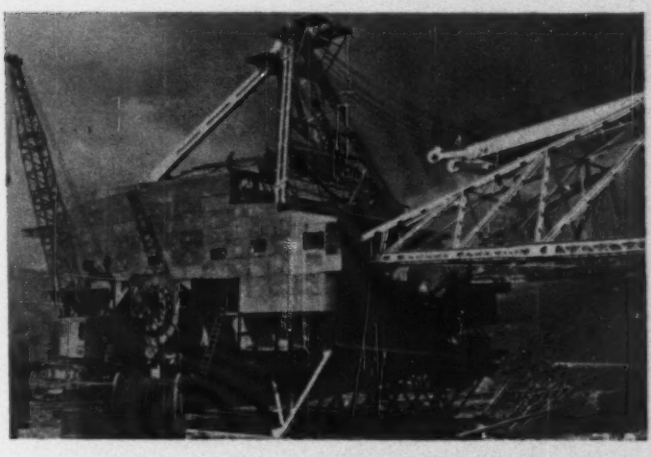
Source	Value of imports into Italy (in £ million)				Whole of 1963
	first ten months				
	1962		1963		
	amount	% of total imports	amount	% of total imports	
Total all sources	1,771·7		2,232·5		2,708
W. Germany	303·8	17·2	378·2	17·0	
France	156·8	8·8	215·3	9·6	
Belgium and Luxembourg	48·0	2·7	72·3	3·3	
Netherlands	47·0	2·6	65·7	2·9	
Total EEC	555·6	31·3	731·5	32·8	
USA	261·9	14·8	302·5	13·5	
UK	113·0	6·4	140·3	6·3	163·6 or 6%
Japan	12·2		27·6		

Moreover, although the value of Italian imports from all sources for the whole of 1963 was 24·3 per cent higher than for 1962, the British share declined to 6 per cent by the end of the year. It is true that over a third of the overall increase in value was due to foodstuffs, especially meat, sugar, cereals and dairy products, which Britain cannot supply in significant quantities. But the remainder, or some 63 per cent, ranged over the whole field of industrial and manufactured products and raw materials. It is also true that the value of exports in the first ten months from West Germany and the United States also slightly declined in proportion to the whole. France and Benelux, on the other hand, increased their shares. Japan, though still relatively a small contributor, more than doubled the value of her exports.

A comparison of the performance of exports from West Germany, the United States and France over the period reveals that the following groups in all three countries are among the principal exports and have expanded substantially: rolled products of iron and steel, mining machinery, electric generators and motors, telecommunications equipment, glass, plastic materials and chemicals. Iron and steel scrap is another important export common to all three but in each case has fallen substantially with the growth of the domestic steel industry using imported ore. Other important groups which have expanded are wool and cotton fabrics from France; textile and printing machinery, dyes and colouring materials from West Germany; machine tools, agricultural machinery and cars from both countries. In many of these groups, exports from Britain have also improved. Notable exceptions, however, are telecommunications equipment and chemicals.

The principal increases from the Benelux countries have been first and foremost in foodstuffs, especially meat, but also in agricultural machinery, telecommunications equipment, rolled products of iron and steel, non-electrical power units, copper and copper alloys and wool. The major increases from Japan were in rolled products of iron and steel and in frozen fish.

From the foregoing there does not seem to be any obvious reason why the British share of the market should not be larger.



The British market for Italian goods

by Enzo Malgeri, Minister Plenipotentiary (Commercial), Italian Embassy, London

THE TOTAL value of trade between Great Britain and Italy increased again sharply in 1963, rising from £251 million to £273 million (excluding re-exports). To see these figures in the right perspective and to realize just how fast trade between the two countries has increased, one need only compare them with the corresponding figure for 1954 – £111 million. This amounts to an increase of 145 per cent in a decade – an average annual increase of 14 per cent, which is in fact a very high one by any standard.

It is even more remarkable when one considers a fact which comes readily to the minds of observers: that trade between Britain and Italy's partners in the Common Market increased by only 110 per cent over the same period.

However, taking into consideration the structure of the two countries and the fact that both governments long ago decided in favour of a programme of bold liberalization in foreign trade, this development is hardly surprising.

Italy is very dependent on overseas trade, as it has to import most basic materials, some of its food requirements, and, in connection with its rapid industrial development, a large amount of machinery for factories, whilst relying on the export of fruit and vegetables, machinery and other finished goods to earn the necessary foreign exchange.

Britain is in a very similar position. For both countries, in fact, the foreign trade component of the Gross National Product is particularly high, amounting to almost 13 per cent for Italy, and to over 15 per cent for Britain.

During the last decade our exports to Britain have increased continuously each year, with the exception of 1963:—

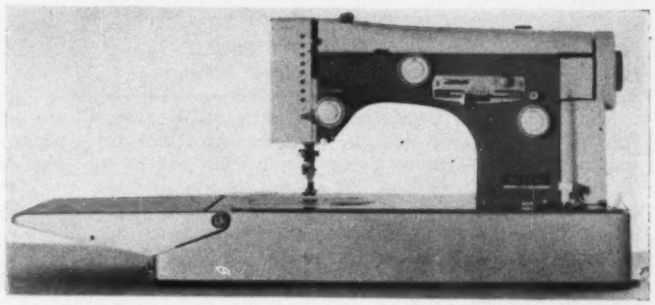
Year	£ thousand	Rate of increase in %
1954	52,408	—
1955	55,605	6·10
1956	57,431	3·28
1957	62,813	9·37
1958	76,812	22·28
1959	92,782	20·79
1960	98,954	6·65
1961	102,431	3·51
1962	112,617	9·94
1963	110,034	— 2·30

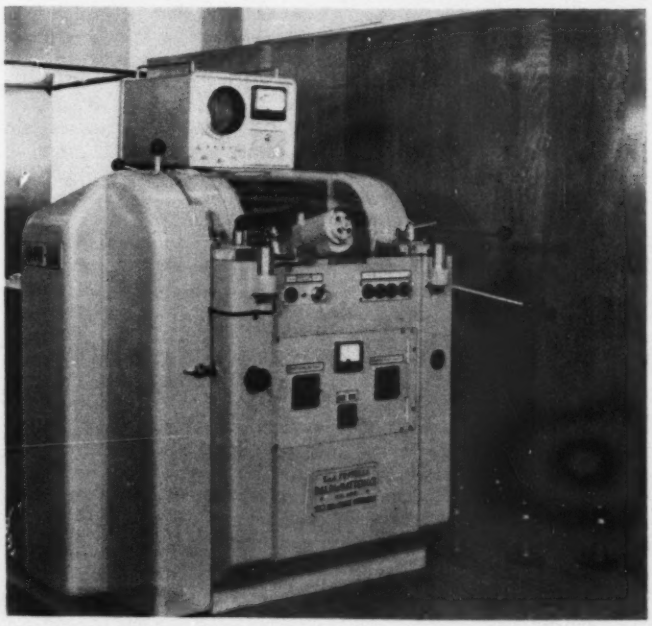
The picture given by the preceding table is one of fairly steady growth over the whole period, with a particularly rapid increase in 1958-1959 and again in 1962, but, if one analyses the content of Italian exports to this country, one realizes that big changes have occured in their pattern.

In 1954 fruit and vegetables accounted for over 42 per cent of our total exports to Britain; five years later, in 1959, they represented 23 per cent of the total; in 1963, a particularly difficult year for such products because of adverse weather conditions in Italy, they went down to 20 per cent.

Conversely, engineering products, which accounted for less than 9 per cent of the total in 1954, reached 21 per cent in 1959, and rose to over 23 per cent in 1963. The same pattern, although at a lower level, was followed by our exports of clothes and accessories.

This development is the natural reflection of what has happened, during more or less the same period, inside Italy, where the number of labourers working in agriculture has decreased from 40 per cent to 27 per cent, and industrial output has increased two-and-a-half times.





Page 20 (top) Agricultural produce – in particular citrus fruits – still form an important part of the Italian export drive.

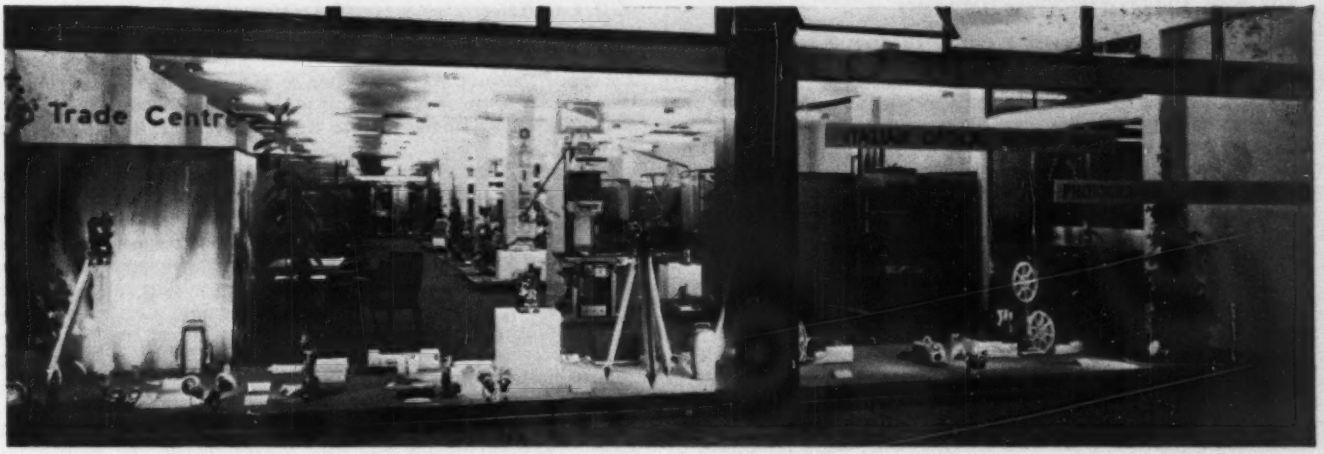
(Centre) Julia 534 Necchi electric sewing machine.

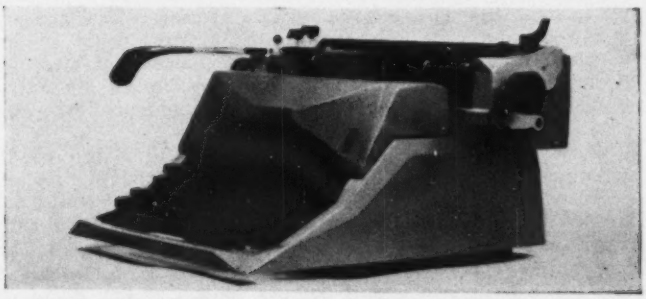
(Below) Electronic controls for machine tools by Daldi and Matteucci, Milan.

Page 21 (top) The Italian Trade Centre at Old Burlington Street, London.

(Centre) Olivetti 82 Diaspron standard manual typewriter.

(Below) Part of a display of travel goods at the Italian Trade Centre in London.





The result of all this is that our exports to Britain are now much more varied than they were in the past, which is always an advantage in international trade, because a variety of products strengthens the overall competitive position.

The composition of our exports to Britain in 1963, by main commodities, is shown in the following table:

Product	£ thousand
Fruit and vegetables	22,753
Non-electric machinery	13,316
Textiles	13,050
Petroleum and products	8,450
Clothing	7,033
Footwear	5,960
Transport equipment	5,247
Scientific instruments, photographic equipment, etc.	1,514
Total (including others)	110,034

We do feel, however, that more can and should be done in this direction, and we are therefore devoting a considerable part of our promotional activity to the introduction of new products to this market. This activity goes hand in hand with the aim of consolidating existing outlets. The result of these efforts will, we hope, be a more even balance in the trade between the two countries, a balance which, in the interest of both countries, should be achieved at the highest possible level.

Italian Embassy in London:
14, Three Kings Yard,
London, W.1. Telephone Mayfair 8200.

Office of the Commercial Minister:
Italian Trade Centre,
31, Old Burlington Street,
London, W.1. Telephone: Regent 2411.

The Italian Trade Centre is composed of:
The Office of the Commercial Minister;
The London Office of the Italian Institute for Foreign Trade;
The Italian Chamber of Commerce for Great Britain.

The exhibition hall of the Italian Trade Centre, where monthly exhibitions of Italian products are held, is situated at 25 Old Burlington Street, W.1. Telephone: Regent 2411.

Government and non-Government Services

Introduction

by Sir William McFadzean, Chairman, Export Council for Europe

ONE OF THE first things the Export Council for Europe discovered when it started work just over three years ago, was that a surprisingly large number of British firms, otherwise ready to enter the export market, hesitate to do so because they lack information about the country concerned and do not know the best way to obtain it.

At the many meetings the Council has organized up and down the country and in all our publications and other approaches to industry, we have emphasized that every new exporter should arm himself with hard facts at the outset and that a very great deal of the preliminary information he needs is readily available in this country at little or no cost.

I am glad to say that as a result of the spread of interest in Continental markets over the past three years and the far greater flow of information available on the right sources to approach, many more manufacturers than formerly are taking advantage of the facilities of the Export Services Branch of the Board of Trade and, through this channel, of the splendid help given by our Embassies and Consular posts abroad.

From experience of the Council's work, involving frequent visits to all the chief West European markets, I know well how much is accomplished by the Economic and Commercial officers and their staffs. Complementary to and in co-ordination with this Government service is, of course, the most valuable work of British Chambers of Commerce abroad. The British Chamber of Commerce for Italy has its head office in Milan as well as resident representatives in Rome and elsewhere. Many special facilities are also offered by the Federation of British Industries and the National Association of British Manufacturers, which are two of the Export Council's sponsoring bodies.

Information at the outset must, of course, be followed by a continuing flow but first and last, once an exporter has taken the plunge, there is no substitute for personal visits, at as high a level as possible. I am sure that any exporter, equipped with the facts described in this section of the *Board of Trade Journal* Supplement and with his wits about him, can safely tackle and succeed in the important and challenging Italian market.

THE 'BOARD OF TRADE JOURNAL' AND EXPORTS

The Board of Trade Journal, *published every Friday, price 1s. 6d., is an authoritative source for information about export opportunities for British traders. Much of its information is not available elsewhere.*

Besides numerous statistical articles dealing with key aspects of the national economy and lists and reports of trade fairs and exhibitions, the Board of Trade Journal *carries regular surveys of prospects for British goods from commercial officers in over* 200 *posts throughout the world; also summaries of tenders issued, agencies required and details of changes in tariffs, customs, import regulations, etc., in overseas countries. Periodically important supplements covering the trade outlook in particular countries are included free of charge.*

Government Services

by Commercial Relations and Exports Department, Board of Trade

THE GOVERNMENT organization at home and overseas provides British exporters free of charge with a wide range of indispensable information.

The hub of the organization, the *Export Services Branch* of the Board of Trade, has available information drawn from over 200 British official sources across the world about local market prospects for almost every kind of product; about competing domestic and foreign goods; about local tastes and the important features of other countries' commercial practices, trading methods and current business conditions. It supplies accurate, detailed and up-to-date information on other countries' tariffs and market regulations – everything which an exporter needs to know, including import licensing and quota arrangements, imports of samples, certificates of origin, and trade and merchandising marks.

For the exporter who wants a trading connection overseas the Export Services Branch will brief British commercial representatives abroad about the special requirements of any British firm and put forward suggestions selected from the overseas officers' personal experience and close contact with the business world in any territory. From extensive records of the commercial status of thousands of firms abroad, Export Services Branch can advise British firms about the suitability of any connection they may contemplate.

World-wide calls for tender, requirements for British goods, opportunities to make selling connections abroad, and brief matter-of-fact reports about the markets for particular commodities for individual countries, all flooding into the Export Services Branch daily, are published within 24 hours (Monday to Friday) in the *Export Service Bulletin*. A subscription costs only 10 guineas a year (write or 'phone Export Services Branch or any Board of Trade Regional Office) and includes a Quarterly Supplement of concise comments about the current economic and business climate in all countries from the men on the spot throughout the world.

British businessmen visiting overseas markets are encouraged to make use of the knowledge and assistance which British commercial officers will gladly provide. They have only to get in touch with the Export Services Branch or any Regional Office of the Board of Trade* for background information about the places they will visit, and for immediate arrangements to be made about appointments and any necessary introductions they require. If they wish it, local publicity about their visit can sometimes be arranged. All they need to know about local trade conditions and methods, local customs, travel, hotels, and a wealth of material about the country they propose to visit, is to be found in the series of booklets 'Hints to Business Men' – there is one about Italy – obtainable free of charge from the Export Services Branch or from any Regional Office.

In Italy, the principal commercial department is in the *British Embassy* in *Rome* and the *Consulates-General* in *Milan* and *Naples* are staffed to deal with commercial inquiries. But inquiries should in the first place be made to the Board of Trade, where they can often be answered immediately.

* In London, Manchester, Birmingham, Leeds, Newcastle-upon-Tyne, Bristol, Cardiff, Glasgow, Belfast. For addresses see this issue of the *Board of Trade Journal*.

Details of important trade fairs and exhibitions to be held abroad are available from *Export Promotion and Fairs Branch* of the Board of Trade which can give advice on where goods can best be shown and about the costs and conditions of exhibiting. An article about fairs in Italy appears on page 37 of this supplement.

Publicity for British exhibitors can also be arranged by Export Promotion and Fairs Branch in conjunction with the Central Office of Information.

Overseas customers normally require credit which inevitably puts exporters at some risk as regards payment. An *Export Credits Guarantee Department* policy gives clear advantages to exporters. Italy is noted among ECGD's better risks and premiums are correspondingly low, but risks do exist and an ECGD policy can take care of the major part of the exporter's losses.

For Italy alone, ECGD have files on 6,900 importers and any of their branch offices can agree figures on 3,500 of these immediately, even by telephone if necessary. For other importers, inquiries can be Telexed or cabled to agents for quick replies. Exporters are thus enabled to assess the buyer's ability to meet his commitments. ECGD caters for exporters of all kinds. Firms whose export turnover is under £10,000 a year can take out a 'small exporter' policy; at the other end of the scale are specialized policies covering major capital projects, or those requiring long periods of credit.

Non-Government services

A number of non-Governmental bodies give valuable help in promoting British exports, e.g. by organizing inward and outward trade missions, carrying out market inquiries and providing information on the mechanics of exporting.

At the centre of these bodies is the *Export Council for Europe* which is supported by both Government and industry and is sponsored by the Association of British Chambers of Commerce, the Federation of British Industries, and the National Association of British Manufacturers.

Members of the Council visited Italy in February 1961, in May 1963 and again in March 1964 to assess the potentialities of the Italian market.

In 1962/63 the Council was associated with missions to Italy by cattle breeders and by manufacturers of contractors' plant. The latter was followed in 1963 by a mission to Britain of Italian users of contractors' plant which was organized by the Council in co-operation with the Federation of Manufacturers of Contractors' Plant. This year the Council assisted the Gauge and Tool Makers' Association in organizing in April a mission of Italian users of precision tools.

British Chambers of Commerce at home and abroad, linked by the *Association of British Chambers of Commerce*, are especially well qualified to assist British exporters, since their membership includes importers as well as exporters. The services offered by the Chambers include information on customs matters, exchange control, licensing, sources of supply and demand, marking, packing, appointment of agents, participation in trade fairs and exhibitions, and provision of translations and interpreters.

The British Chamber of Commerce for Italy is based in Milan but its activities cover the whole of Italy through a network of regional secretaries. The Chamber's officers work closely with the Commercial Department of the British Embassy in Rome and with the Consulate-General in Milan. The continuity of experience and practical "know-how" of the Chamber's Councillors, who are executives of British companies working in Italy, enables the Chamber to give a comprehensive service to members; and to non-members on a fee-paying basis.

The Federation of British Industries, through the West European Department of its Overseas Directorate, maintains a close working liaison with the British Chamber of Commerce which has been its representative in Italy for a number of years. The Chamber extends its full range of services to FBI members in their export problems and feeds into the FBI purchasing inquiries, agency and licensing offers from Italian firms.

The National Association of British Manufacturers offers a service to exporters particularly designed to assist the small and medium-sized firms which largely comprise the Association's membership. An Export Assistance Department deals with members' day-to-day problems and also channels export inquiries to members through the ten branch offices of the Association. The Department is in touch with merchant and export houses and large exporters through whom the smaller exporter may be able to do business.

Addresses

TARIFFS, MARKET INFORMATION, AGENTS

BOARD OF TRADE:
EXPORT SERVICES BRANCH AND EXPORT INFORMATION CENTRE
Hillgate House, 35 Old Bailey, London, E.C.4.
Telephone: City 5757

REGIONAL OFFICES
(See list in issue dated April 24, 1964)

BRITISH EMBASSY (COMMERCIAL DEPARTMENT)
Villa Wolkonsky, Via Conte Rosso 25, Rome.
Telephone: 776551-776556

BRITISH CONSULATE-GENERAL
Via Gabba 1a, Milan.
Telephone: 862486

BRITISH CONSULATE-GENERAL
Via Francesco Crispi 122, Naples.
Telephone: 385641 and 382482

EXHIBITIONS AND FAIRS

EXPORT PROMOTION AND FAIRS BRANCH
Queen Anne's Mansions, London, S.W.1.
Telephone: Abbey 7877

EXPORT CREDIT INSURANCE

EXPORT CREDITS GUARANTEE DEPARTMENT
Head Office: 59/67 Gresham Street, London, E.C.2.
Telephone: Monarch 6699

TRADE MISSIONS, PROMOTIONAL ACTIVITIES

EXPORT COUNCIL FOR EUROPE
21 Tothill Street, London, S.W.1.
Telephone: Whitehall 2256

COMMERCIAL INFORMATION

ASSOCIATION OF BRITISH CHAMBERS OF COMMERCE
68 Queen Street, London, E.C.4.
Telephone: City 7211

FEDERATION OF BRITISH INDUSTRIES
21 Tothill Street, London, S.W.1.
Telephone: Whitehall 6711

NATIONAL ASSOCIATION OF BRITISH MANUFACTURERS
6 Holborn Viaduct, London, E.C.1.
Telephone: City 6031

INVESTMENT IN ITALY

BOARD OF TRADE (C.R.E. Department)
1-19 Victoria Street, London, S.W.1.
Telephone: Abbey 7877

LONDON BRANCHES OF ITALIAN BANKS:
Italian Economic Corporation (Banca Nazionale del Lavoro)
54 Threadneedle Street, London, E.C.4.
Telephone: Monarch 3156-7

Banca Commerciale Italiana
21 Birchin Lane, London, E.C.3.
Telephone: Mansion House 0148

Attacking the Italian market

by Sir John Wrightson, Bt., T.D., Leader, Italian team, Export Council for Europe

DESPITE SOME RECENT signs of tension, Italy's economic expansion continues to offer great opportunities for British exporters.

The tempo of Italian industrial development has been marked by rises in wages and costs. Expansion of exports has slowed down while imports have risen. Present measures to achieve political stability promise solution of the current trade deficit, since Italy's economy is basically sound.

Meanwhile there are openings for British manufacturers of capital equipment, especially in the South, for partnerships and licensing agreements in which British finance and experience can be introduced with benefit to both sides, and for consumer and consumer durable products for which industrialization, by creating a large higher income group, has fostered demand.

Among many promising outlets for British industry are the markets for agricultural machinery, tractors, some domestic electric appliances, toys and various foodstuffs. Food consumption has increased sharply with higher living standards, and there is a market developing for traditional British fare.

Although British exports to Italy increased after 1960, and rose sharply in 1963, our *share* of the Italian market is still only some 6 per cent. It would seem reasonable to conclude that British exporters have not yet taken full advantage of the tremendous upsurge in Italian demand for foreign goods.

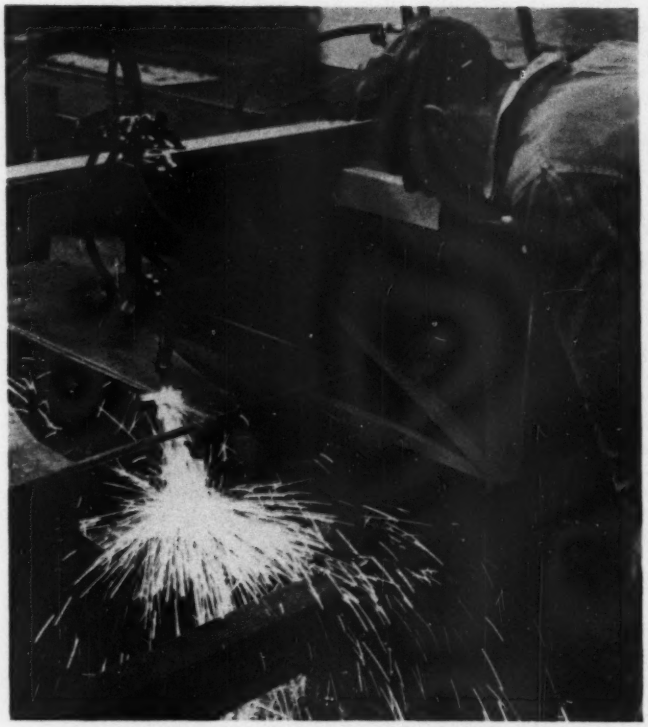
Consumer demand is strongest in such centres as Milan, Turin and Genoa where *per capita* income is four times that of the poorer provinces – indeed a consumer living in Milan has probably more in common with his counterpart in London or Paris than with a consumer in Sicily or Calabria.

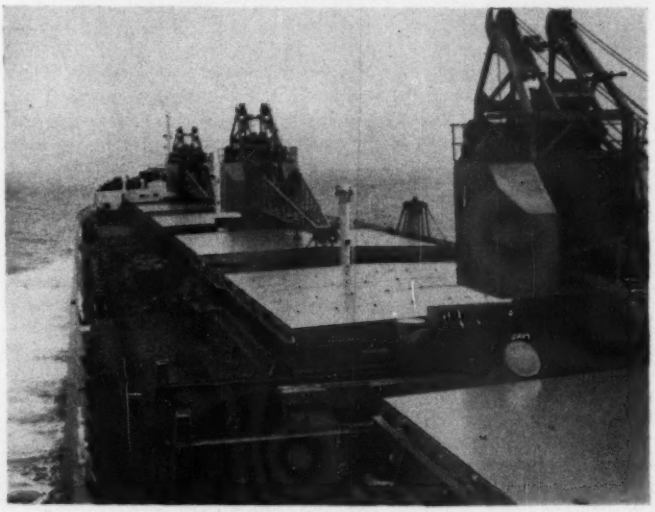
Facts brought to the notice of the Export Council for Europe – whether from the reports of outward missions it has itself organized, from visits to this country of Italian industrial groups it has sponsored or assisted, or from the 'success stories' of individual British firms which have tackled the market systematically – have all stressed the need for personal approach.

The marketing problems for a British businessman in Italy include those of language, of local and traditional tastes and design requirements, of transport and credit, as well as the existence of astute and highly organized competitors.

The information set out in the present admirably timed *Board of Trade Journal* Supplement provides all the basic guidance a new exporter to this market requires. It can be supplemented by inquiry from Government sources either in this country or in Italy.

At the next stage, however, there can be no doubt at all that the best method is to go out and see the market yourself, with authority to sign a contract on the spot.





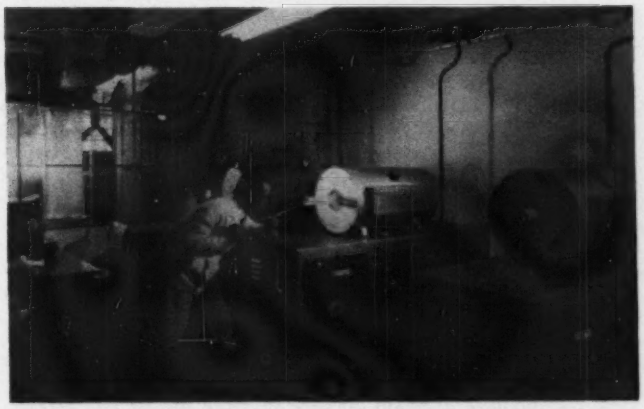
(Top) British Oxygen Co. Ltd., Cub Major cross-carriage cutting machine, seen here cutting mild steel plate, is now being exported to Italy. (Centre) A five-day 'Via Veneto' exhibition was organized in Rome recently by the Manchester converting house, George Tingey and Co. Ltd. at which some 40 new designs in shirtings were displayed. Sir Raymond Streat (second from right), a former Chairman of the Cotton Board, met directors of the company at a reception during the exhibition. (Lower) New dry cargo vessel launched at Genoa with British cranes made by Clarke-Chapman and Co. of Gateshead.

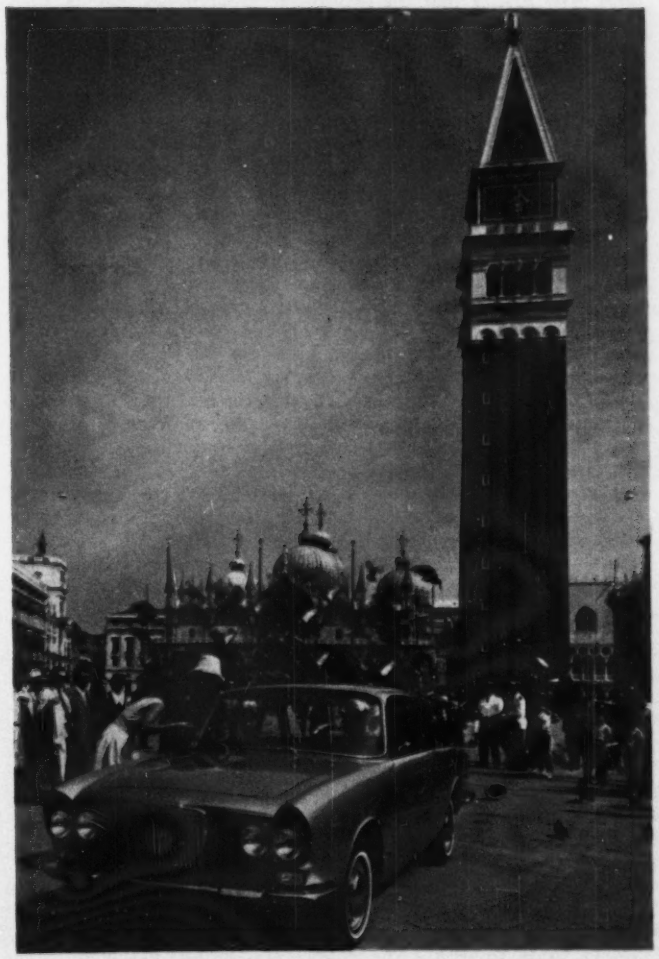
Prospects for British goods in the Italian market

by the British Embassy, Rome

Loading a diffusion furnace at the Turina factory of International Rectifier Corporation Italiana. A half interest in this company has recently been acquired by Metal Industries Ltd.

(Lower) The Sunbeam Superleggera Venezia arouses great interest in Venice.





AN EARLIER ARTICLE describes the changes which have taken place during the last ten years in the Italian economy and their effect on the way of life of the Italian people. In itself, this is perhaps an interesting academic study for the professional economist; what interests the British businessman, however, is how these changes are likely to affect the Italian market for his goods. The purpose of this article, therefore, is to try to link economic trends with the business of buying and selling.

The upsurge in the Italian economy is clearly reflected in the foreign trade figures. Imports from all sources in 1962 (the last year for which, at the time of writing, a complete breakdown by commodities is available) had increased in value by 150 per cent over 1954. However, it is not only the fact that Italy is now buying very much more overseas than before which is interesting; what is even more significant is the way in which the pattern of Italian imports has shifted. Imports of tropical fruits rose by 140 per cent, of cattle by 230 per cent, of fresh and frozen meat by 120 per cent, of cooked or preserved meat by 720 per cent, of fresh and frozen fish by 260 per cent, of confectionery by 130 per cent, of milk and butter by 280 per cent, and of spirits and liqueurs by as much as 4,540 per cent; evidence that the Italians are not only eating and drinking more, but that they are varying their diet with a wide range of speciality foods from abroad which they had hitherto been unable to afford. It also indicates the awakening interest in such foods as the mass market becomes aware of them – notably through television advertising. Imports of woollen fabrics rose by 90 per cent, of woollen knitwear by 240 per cent, of furniture by 460 per cent, and of glass and crystalware by 230 per cent – and in 1962 the Italians bought nearly 107,000 foreign cars as compared with little more than 2,600 in 1954; evidence of a much higher rate of spending on the more expensive lines of clothing, household and personal effects from overseas. Imports of iron ore increased by 470 per cent, of crude oil by 90 per cent, of iron and steel by 350 per cent (by weight), of machinery and apparatus by 220 per cent; evidence of the growth of the requirements of Italian industry for both basic materials and capital equipment. These figures undoubtedly reflect the increase in prices between 1954 and 1962; but they also give some indication of the extent to which Italy has been looking overseas for the goods she needs to meet the requirements of a fast-growing industry and a rapidly-rising standard of living.

What then are the future prospects for British goods in the Italian market? In the capital goods field, these will depend on the extent to which the rate of growth in Italian industry is likely to be maintained and on whether there is likely to be any attempt to accelerate Italian agricultural production, either by new methods of stock raising and crop cultivation or by consolidation of farm holdings and increased mechanization. How far is Italian industry prepared to modernize and expand its existing plant? What is the Italian farmer likely to require in the shape of livestock and agricultural machinery? In short, what are the investment plans of Italian agriculture and industry over the next few years?

In its economic, as distinct from its social, aspects the problem of Italian agriculture is perhaps easy to diagnose but more difficult to resolve. At a time when the deficit in Italian foreign trade is being accentuated by unusually heavy imports of foodstuffs, particularly of meat, sugar and dairy products, there is a steady drift

away from the land into industry. This drift cannot be halted without further restricting an already tight industrial labour market, and in any case it is unsound economically for such a large part of the labour force to be engaged in agriculture. To ease the burden of payments, therefore, Italy must step up productivity on the land. She must improve the standard of cattle breeding, both for meat and dairy produce, and replace high-cost manual labour with machines. The demand for meat has risen sharply in line with the overall rise in the living standard of the Italian population, and is likely to rise still further, since even now Italian consumption per head is much lower than the average in the European Economic Community. Although Italian agricultural output has risen overall, it has not kept pace with the demand for meat. Traditional methods of raising cattle in stall are wasteful of labour and the problem is therefore to produce more meat with less labour. Proposals have been made for improving the health of livestock by eliminating brucellosis and tuberculosis. This will produce long-term results but not an immediate increase in the supply of meat. Other proposals provide for loans at low interest rates to consolidate and increase the size of farm holdings, which will make mechanization more profitable; and other loans (for 5 years at 2 per cent interest) to provide for the purchase of livestock, farm machinery and other equipment. The Reform (or Development Areas) are to continue to encourage marketing co-operatives and other facilities for the assistance of farmers in their areas. All in all, it is forecast that over the next four or five years, private and Government investment in agriculture will run at an annual rate of over £300 million.

Developments in agriculture and industry

There appear to be possibilities therefore at the present time for sales of meat and of livestock for fattening in Italy. If the Italian authorities can be persuaded, there may also be possibilities for the sale of livestock for breeding, especially of stock which can be raised in conditions demanding a less intensive employment of labour. There should be increased possibilities arising out of the new legislation for the sale of agricultural machinery, though the Federconsorzi (Federation of farm syndicates or co-operatives) holds at present some 50 per cent of the market for agricultural machinery and tends to make exclusive contracts for the sale of particular types of machinery. Nevertheless, there are independent agents, and there are also the co-operatives set up in the Reform Areas which offer alternative outlets and may play a growing part in Italian agriculture in the future. These areas are, for the most part, in Central and Southern Italy and are devoted largely to the cultivation of olives, grapes, tomatoes, citrus fruits and vegetables. Their requirements are, therefore, likely to be for small motor cultivators, (of which Italy imported in the first half of 1963 almost as much as in the whole of 1962) and irrigation equipment. Although we hold at present about 45 per cent of the import market for tractors, and 15 per cent of that for harvesting and threshing machinery, (the percentage is considerably higher in the case of balers), we do not appear to have paid much attention so far to other types.

In industry, the forecast is for a substantial increase in the programme of investment up to 1966, both in the private and state-controlled sectors. According to the forecast, the 1966 figure will show increases over that for 1963 as follows:

Product	% increase
Confectionery	30
Beer (also sharp rise in alcohol and spirits in 1964 and 1965)	15
Textiles (especially cotton and artificial and synthetic fibres)	30
Ready-made clothing	30
Non-ferrous metals	30
Copper, copper alloy and semi-manufactures (aluminium investment will be doubled in 1965)	15
Non-electrical machinery	8
Iron foundries	18
Metal-working machinery	17
Electrical machinery, apparatus and instruments; telecommunications equipment	60
Precision engineering	30
Chemicals	54
Pharmaceuticals	18
Petroleum and coal derivatives	7
Rubber working	100
Printing	13
Plastics	12
Electricity	25
Glass; very heavy investment in 1964/5.	

In the state-controlled sector, the Institute for Industrial Reconstruction (IRI), the holding company which controls a large proportion of Italian industry (see second paragraph of article on 'Modern Italy') published a four-year investment programme for the period 1963-1966. According to this programme, steel output is to be doubled; pig iron output is to rise by 143 per cent and cement production by 78 per cent; engineering sales are to increase by 70 per cent; the conversion, modernization and specialization of Italian shipyards is to be completed; nine new ships of a combined capacity of 171,000 tons are to be taken into commission; 17 new jet aircraft are to be acquired by Alitalia; another 740 kilometres of toll motor-ways are to be opened to traffic; the number of telephone instruments installed is to be increased by 40 per cent and the automatic handling of urban and trunk calls extended; and the television network is to be further expanded.

This is a programme of expansion, not retrenchment. But before we consider what the effects are likely to be on exports of individual commodities, it might be wise to make one or two reservations. The first is that the investment programmes may in some respects be too optimistic. Given the Bank of Italy's credit squeeze and the present reluctance of the private investor to risk his funds in industrial equities and bonds, both the state-controlled and private sectors of industry are having difficulty in raising in the capital market money they require for the modernization and extension of their plant. The Government has announced its intention of introducing a system of priorities for access to the market and of launching a five year plan for the Italian economy as from January 1, 1965; the emphasis may, therefore, shift to investment in those industries whose products are most likely to ease the inflationary pressure and benefit the balance of payments. But whatever modifications may be made to present investment plans, they will have to take account of the increasing shortage of employable labour, which will inevitably involve the introduction of labour-saving equipment of every kind into the factory and on to the land. British exporters will however face keen competition. It is true that the costs of Italian industry are rising and that wages in the North of Italy, including surcharges amounting to about 80 per cent of the basic rate, are at least equal to British wages. But competition will be sharp from industry in the Common Market. On the whole, the overall level of the the Italian tariff is higher than that of the Common External Tariff and is being progressively reduced, but the decrease is sharper for Germany, France and Benelux, who will, of course eventually (possibly by 1967) pay no tariff at all.

Capital goods

The investment programme outlined above is a reliable pointer to the special opportunities for British capital goods in the Italian market over the next two or three years. The confectionery, canning and bottling industries will require a wide range of food preparation machinery. Rising labour costs are forcing greater mechanization – in the bakery industry for example. Our share of an expanding market has been declining – from 31 per cent in 1961 to 15 per cent in 1962. Whereas in the case of canning and bottling machinery alone, Italian imports almost doubled in 1962 over the previous year, our share fell from 7 per cent to less than 5 per cent. The steady expansion forecast for investment in the textile industry should similarly provide opportunities for our weaving,

spinning, dyeing and finishing machinery, and the shortage of labour is bound to give a particularly strong impulse to the manufacture of ready-made clothing. But here again our share of the growing market for textile machinery generally fell slightly in 1962. The expansion planned in the iron and steel and non-ferrous metals industries should open up new prospects for the sale of metallurgical plant and machinery; and in this market we are already fairly well established with our rolling mills. The planned increases in investment in the manufacture of machinery, both electrical and non-electrical, and in precision engineering, should provide good openings for our tools and our machine tools. It is true that the rate of investment in vehicle construction, hitherto the main outlet for our machine tools, is declining, but the rising trend in other sectors should more than offset this. At present we hold little more than 5 per cent of the imported tool market. In the first half of 1963, our share of the market for broaches, stamps, dyes and punches had fallen back and in the machine tool sector, although we are holding our own overall, in automatic rollers and gear-cutting machines our exports were virtually nil.

Investments in the chemical, rubber, cement and plastics industries will, of course, involve an extensive programme of factory construction; in addition, the road network is to be expanded, and over the next five years some £120 million is to be spent on the construction of low-cost housing. Not only the demand for constructional machinery and plant, but also for new building systems and building materials will, therefore, be strong, particularly in the South, where much of the construction of houses, factories, hospitals and schools will be concentrated. And the extension of urban living will ultimately require the installation of adequate sewerage systems, notably lacking in Italy at present. We hold just under 20 per cent of the market for mining and excavating machinery, but again our share has been falling in an expanding market.

The generation and distribution of electric power has now been taken over by the State. Consumption is increasing at the rate of nearly 10 per cent per year and ENEL, the State Electricity Board, plans to keep the expansion of generating capacity about 1 per cent ahead of this. According to the Chairman, this means building over the next eight years generating capacity equivalent to that built during the last sixty. Hydroelectric power has almost reached its maximum level of exploitation. Italy has two atomic power stations in operation at present, and one under construction; the Board will probably prefer to wait and see what sort of results are obtained before building any more. The power stations to be constructed are, therefore, likely to be mainly thermal, and at present Italian law stipulates that these shall be of the dual-fired type, coal and oil. ENEL have given an assurance that they will invite international bids for items of major equipment such as alternators and generators, or special equipment such as oil-filled cables, aluminium cables and certain types of insulators. But only qualified firms who are entered on a special register will receive invitations to tender, and interested British firms should therefore stake out their claims now by supplying ENEL with information about their experience and financial status and the types of equipment which they manufacture.

Consumer goods

Attention has been drawn elsewhere in this supplement to the steep rise over the last ten years in the rate of expenditure of the Italian consumer. So far as our exporters of consumer goods are concerned, however, the question to be asked is: What is being bought with this greatly increased disposable income? Is the Italian consumer merely buying more of what he bought before? Or is he now spending his money on a wider range of goods and services which would offer scope for broadening the base of our export trade with Italy? In other words, how, if at all, is the pattern of consumer spending likely to change?

Before considering individual commodity sectors, it might be worth while to point to some salient features of the market. The population growth at the rate of ¼ million a year means a bigger overall demand for consumer goods, and as 6 out of every 10 people are under 40, the demand is likely to be strongest for those kinds of goods bought by young people – clothes, house furnishings, radios, television and sound reproducing equipment, toys, cars, etc. The biggest boost to consumption is coming from the increased purchasing power derived from higher earnings – in 1963 industrial wages went up by at least 13 per cent. The pent-up demand released by the higher purchasing power now in circulation, has stimulated both domestic production and imports. In 1962 the output of the consumer goods industry rose by almost 15 per cent; and although imports of consumer goods in the first 8 months of that year were only 5·7 per cent more than in the same period in 1961, in the last four months the increase was over 30 per cent. The rate of personal expenditure is expected to rise much more rapidly in the South than in the North, and, indeed, than in Italy as a whole. By 1962, private consumption in the South had more than doubled in 11 years. As compared with 1960, the expected increase by 1970 is 54 per cent, as compared with 48 per cent for the whole country. The dwindling pool of unemployed labour and domestic servants and the increasing tendency for wives as well as daughters to take jobs in industry, means a rising demand for labour-saving goods in the home – washing and dishwashing machines, drip-dry fabrics and easily prepared foodstuffs (especially the quick-frozen variety). This applies equally to the office, which is likely to require more calculating machines, banknote counting machines, etc.

Changes in spending habits

It follows from this that radical changes are under way in the spending habits of the Italian family. The proportion of the family budget spent on food is expected to have fallen further by 1970 to well below 40 per cent. Italian eating habits also seem to be changing. The consumption of pasta is expected to remain static, but by 1970 the forecast is for a 38 per cent increase in vegetables and fruit, 30 per cent in meat, fish and eggs, 29 per cent in milk and milk products, 40 per cent in beverages (more non-alcoholic than alcoholic, however) and 38 per cent in 'other foods'. So far as British exports are concerned, this should stimulate the demand for better quality meat, for prepared vegetables, for automatic vendors and disposable cups, as well as formulas for beverages, and (with the growing taste for a more varied diet) for confectionery, biscuits and preserves of all kinds. Yet the performance of British exports does not measure up to the prospects. Although in 1962 we had slightly increased our percentage share of a rapidly expanding market for confectionery and sweets to 14 per cent, our share of a similar growing market for meat extracts and broths had fallen sharply to a negligible figure. Overall imports of fruit juices and jams indicated an even steeper rise in demand, yet our share of the market in 1962 was halved. And as yet we do not seem to have grasped the possibilities for large-scale marketing of commercial refrigeration equipment and deep-freeze cabinets offered by the smaller stores as well as the supermarkets, catering for the rapidly rising demand for deep-frozen foods.

With a smaller proportion of the family budget spent on food, the Italian consumer's 'disposable income' available for expenditure on other items, is likely to grow both relatively and absolutely. By 1970, as compared with 1960, he is expected to spend over twice as much on the purchase of private transport, thus providing a growing market for our cars. It is thought that expenditure on the cost of operating his transport will rise rather more in proportion, thus giving us openings for our spare parts, garage equipment, tools, washing plant, tyres, batteries, accessories, lubricants and polishes. The Italian housewife will be spending nearly twice as much on household durables with consequent openings for our furniture and furnishings, china and glass, electrical appliances, bedding and kitchen equipment. The emphasis here is likely to be on labour-saving appliances and modern kitchen layouts. We seem to be making steady progress in the growing market for smaller electrical appliances, but in the market for vacuum cleaners and floor polishers, which is expanding even more rapidly, our share has been falling. We are easily the leading supplier of chinaware, but seem to be nowhere in the running for cutlery and table glassware. Sport, recreation and entertainment are likely by 1970 to

attract 80 per cent more of the Italian consumer's income than they do at present. Boating and underwater fishing are becoming popular pastimes, particularly in the North – so much so that the motorboat or cabin-cruiser is rapidly replacing the motorcar as the 'status symbol' on the American pattern. Although our boats and yachts (with some few exceptions) have, as yet, made no great impact on the market, our out-board motors should do well; our present share of the import market for internal combustion engines is, however, no more than 12 per cent. It is roughly in the same proportion for toys, where we should be able to improve on our performance, particularly in the higher quality ranges, if we remember that it is the element of novelty which attracts the Italian buyer. In 1962 total Italian imports of sports equipment increased by 8 times over the previous year and continued this steeply upward trend in 1963; yet our share of the market declined.

Unless the forecast is modified by recent U.S. and British findings on the harmful effects of tobacco, the Italian smoker by 1970 is expected to spend half as much again on this item. Given the State monopoly on tobacco, we may find it difficult to sell many cigarettes, but we can sell cigarette making machinery, paper (including filter tips) and smokers' accessories. Again, however, although the market for imported cigarette lighters almost doubled in 1962 over the previous year, our own share dropped. On clothing and footwear, too, the Italian should be spending nearly half as much again at the end of this decade as he was at the beginning; and with the growing shortage of labour, he may be obliged to turn increasingly to ready-made clothing. But in 1962 our share of the market over this entire field, both fabrics and garments, fell with the one exception of men's and boys' raincoats.

Growth of supermarkets

However, it is not merely what the Italian consumer buys, it is also where he buys that is of interest to our exporters; and it is not too much to say that, in methods of retailing, there is a revolution under way in Italy. The day of the traditional small Italian shop selling everything from beads to biscuits, is rapidly passing. There has been a tremendous growth in chain stores and supermarkets in recent years. By the end of 1962 there were 259 chain store branches and 220 supermarkets throughout the country and in 1963 the proliferation of this type of retail outlet was even more pronounced, 50 new supermarkets coming into operation during the first 6 months of that year. A large proportion of the supermarkets is operated by eleven multiple companies, many of whom are themselves associated with, or controlled by, department or chain stores such as the Rinascente-UPIM group and the Standa group. Only two or three of the multiples as yet operate branches nation-wide; the remainder operate within individual provinces. About 50 per cent of the chain stores and supermarkets are located in the North and only 25 per cent in the South. But they are growing rapidly in the South, despite a certain psychological resistance on the part of the South Italian customer to shopping in establishments where he has to accept fixed prices and to renounce the pleasure that haggling over prices affords him.

The trend, then, is towards the American pattern of retailing. The next step will be the shopping centre with ample parking space to afford some relief from the traffic problem, now so acute in most Italian cities. The department store/chain store/supermarket method of retailing will mean a move towards more and more centralized buying by head offices. The purchasing office for a group of stores covering the whole country will tend increasingly to be located in one place and in view of the financial links between the department and chain store on the one hand and the supermarket on the other, this office may well meet the requirements of both. As goods become more standardized, so regional differences will tend to disappear. Centralization of purchasing, coupled with standardization of the product, should ease the distribution problems with which the British exporter to Italy is at present faced – personal visits to the market by the British exporter should prove more fruitful, in that he will be able to concentrate his efforts on one focal point where large orders are likely to be placed, instead of pursuing small buyers all over the country.

The picture which emerges of the Italian market is thus one in which the investment goods' industries have the will and the capacity to expand but are hamstrung at the moment for lack of liquid capital to do so and threatened by rising costs from insistent claims for higher wages; and where the demand for consumer goods in greater quantities and wider ranges is booming as never before. The market in both cases may be affected by the Government austerity programme. The demand for consumer goods may be damped down somewhat, particularly in the durables field, by hire purchase legislation and the taxation of luxuries; and while these measures may encourage savings and thereby ease the tightness of the capital market to the benefit of the capital goods' industries, the investment plans of the latter may have to be adjusted to a system of priorities which will take clearer shape when the Government's five-year plan becomes known.

Although, therefore, the Italian market for British goods is likely to remain buoyant, it is unlikely to favour the British seller quite so strongly as it has in the past few years. (Even so, although our exports have increased, their rate of growth has failed to keep pace with that of Italian imports overall). Our goods have undoubtedly benefited both by the rise in domestic prices and in the lowering of the Italian tariff towards the level of the Common External Tariff. But in the same measure as the Italian Government brings under control the inflationary trends in the economy, Italian prices are likely to be stabilized, and as internal tariffs within the Common Market are progressively reduced to zero, so will the competition from France, Germany and Benelux sharpen. However, increased purchasing power in the pocket of the Italian consumer is stimulating a demand for better quality goods, and this tendency to up-trade should in time develop a market ideally suited to the products of our own consumer goods industries. If our manufacturers of capital goods set their sights on those industries which, in the light of general economic trade are clearly marked out as sectors of growth, they should hold their own and more. The Italian market will, therefore, need careful study, but its potential is still well able to reward the effort.

How to sell in Italy

by Ken Gordon, C.P.V. Italiana (S.p.A.) Councillor of the British Chamber of Commerce for Italy

A PIECE OF POTTED ADVICE on selling says that 'the secret of success is to have the *right* product at the *right* time at the *right* price'. Even with two characteristics out of three you can succeed with the proper effort. With less you are probably heading for trouble.

'The right product'

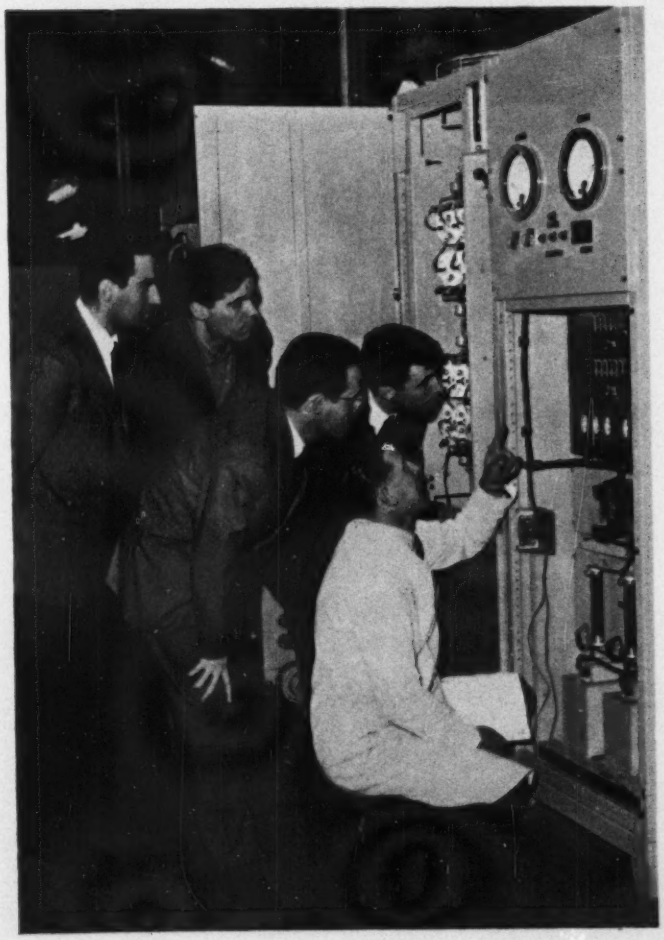
A well-known British pet food manufacturer spends a considerable sum each year feeding his product to pets to make sure that pets like it. Put in terms of selling to Italy, this means that you should find out first whether *Italians* are going to like your product.

In the past five years or so many English and American firms have tripped up badly because they didn't follow this rule. Some were large and highly organized firms who assumed that because their product was the leading brand at home and technically was rated 'A.1', it was bound to succeed in Italy. Unfortunately the 'pets' didn't like it.

Italians in general are very ready to accept foreign products

Top: Mr. C. M. Pirie-Gordon, HM Consul, Florence, discussing a British compressor at the Officine Meccaniche Ferroviarie Pistoiesi at Pistoia. The compressor is made by Fielding & Platt Ltd.. Gloucester.

Below: Some of a party of 100 Italian electrical engineering students who made a study tour of British industry during last April, at the Oxted factory of Lancashire Dynamo Nevelin (M.I. Group).



provided they consider them suitable and better than their own. 'British' is not necessarily synonymous with 'better', though with a few products like woollen goods and whisky it may be nearly so. As the Italian standard of living rises, good quality in the marginal features of a product and in its design and styling becomes more important. Products which are otherwise good and efficient but which are badly finished or unsuitably styled will be severely handicapped.

Be prepared to spend a little time and a little money investigating whether your product is 'right' for the Italian market. You may do this yourself or employ a specialized firm according to the sort of market research you need. If yours is a consumer product then some consumer testing may be required. If it is an industrial product then interviews with the industrialists who are your potential customers will be needed. Do not miss out this important preliminary step. It may save you from severe headache later.

'At the right time'

The Italian economy and market are developing and changing rapidly. Even if the 'miracle' is shining rather less brightly these days, Italy is still demanding better and more up-to-date industrial and consumer goods. You must therefore keep a careful eye on the market. If today it is not yet ripe for your product, in one or two years you may find it very promising, yet in another two years you may find it is already becoming late to get started.

'At the right price'

If you are exporting to Italy then by the time you have paid import duties, transport, general sales tax, etc., you may find your price is relatively high. There are various ways of lowering the price, apart from cutting your profit margin. You may import component parts for assembly in Italy, or you may license an Italian firm to manufacture your product. Or you may set up your own manufacturing facilities in Italy.

One thing however is important. If you have something to offer which Italian products do not have, then you can still import and sell at a high price. One advantage of importation is a guarantee to the buyer that your product is 'the genuine article'. Many successful British firms have organizations for selling and servicing in Italy but continue to import because this guarantees to the customer, both materially and psychologically, the origin and genuineness of the product.

What if your product is just like many others on the Italian market ? Then if your price by importing, or by assembly in Italy, is not competitive you had better seriously consider manufacture in Italy, under licence if necessary, and be prepared to sell against local – and foreign – products.

Our man in . . .

So you have done your market research and your product is suitable. The market is ripe and your price, although a little high, is justified by your product's qualities. How are you going to sell it?

Let us consider one feature which experience has shown to be of great value in any selling set-up in Italy. This is the 'man-on-the-spot'. Ideally this man will be British with a good knowledge of Italy and the Italians, and of their language. You should train him in your company organization so that he will know your company policy and the people who will later be behind him in his selling efforts.

You may have to pay your 'man-on-the-spot' more than you expect, or alternatively compensate him in some other way, to enable him to keep up with his colleagues from large, already established concerns and with the rapidly rising cost-of-living in the larger Italian cities.

You could use an Italian for this job but if your Briton is capable of establishing the right sort of contact with the Italians with whom he has to deal, then, other things being equal, he can fulfil more effectively than a local man the three main functions which you require from your 'man-on-the-spot'.

First, he represents the British firm in Italy and looks after the interests of their customers. The customer feels that by talking to

this man about his problems he is in close contact with the parent firm and not just talking to a distant and detached representative.

Secondly, the parent firm will have more faith in their own man than in a local agent or importer, who may represent other principals and will therefore have divided loyalties, They will rely more on his opinions and consider them to be more objective and balanced. They will know him personally and be more inclined to back him up when the need demands.

Thirdly, he is needed to supervise the selling organization and to ensure that it is functioning smoothly. He will help it to understand the policy of his company and he should make the difference between efficient and inefficient selling.

Distribution and sales

Your sales organization may be anything from your own Italian sales force down to a single agent.

In Italy there are not many efficient organizations whose sole function is to distribute other firms' products to the trade. Hence large go-ahead exporters find it worthwhile to spend some time and money in training their own salesmen. At first, however, you will probably have to try to find an Italian manufacturer who is selling a non-competitive product in similar outlets to those you require. There are some manufacturers who are capable of doing a good job in this way but you should be cautious in your choice. For industrial goods you will probably be slower in creating your own sales force and may find it unnecessary if you are served by good agents or importers.

Whether you use agents or an importer you will almost certainly find it inadvisable to try to cover the whole of Italy with one exclusive organization. The number of single organizations which have good national coverage is small, since physical and racial features help to keep Italy divided into geographical regions. You will probably need to use a minimum of three agents/distributors (one in the North, one in Rome, and one for Naples and the South) who can nominate sub-agents, or, even better, five or six area distributors if good ones can be found.

This arrangement of exclusive area agents/ distributors may make it difficult to establish uniform sales terms and conditions to the final purchasers. It may also be difficult to get distributors to hold sufficient stocks of original equipment or spares. These difficulties lead many firms eventually to set up their own selling company, nearly always with long-term beneficial results, though the early period will usually involve a loss.

Any newcomer to the Italian market who is looking for agents will do well to seek the advice of people who have the knowledge and experience to guide him. Information can be obtained from the Export Services Branch of the Board of Trade, from the Commercial Department of the British Embassy in Rome (and the Consulates-General and Consulates elsewhere in Italy), or from the British Chamber of Commerce for Italy. The latter besides having a long continuity of local knowledge can draw on the practical advice and experience of the executives of British business in Italy who form the Council of the Chamber.

Credit

Firms should be prepared to give longer credit terms in Italy than is usual elsewhere. Credit of 60 to 90 days is normally not uncommon for mass consumer goods. At this moment of difficulty in the Italian economy, the offer of good credit terms could be of definite advantage and would be equivalent to an extra discount.

Italy is still the land of bargaining and usually a flexible approach to the final price will be necessary.

Service

Practically every successful British firm in Italy has attributed its success partly to a speedy and efficient service of maintenance and spares. Failure to satisfy the prospective Italian buyer on this point could go a long way towards your losing the sale.

Investment in stocks of spare parts and an adequate maintenance service will result in long-term benefits to sales which will offset the disadvantage of a slightly higher selling price. In certain types of industry different agents might with advantage be appointed for sales and for service.

Poor service has long been a stumbling-block to the progress of British manufacturers in Italy. Future entrants should bear this well in mind and avoid similar errors.

Telling the Italians about your product

Unless your firm has a world-wide reputation the fact that you happen to have come from the other side of the Channel isn't going to persuade the prospective Italian customers to buy. Your firm may be a household word in the north of England but if it isn't known in Italy then you are starting from scratch.

Telling the Italian about your firm and your product means talking to him in Italian. If you can't speak Italian take someone with you who can, even if it is only an interpreter. It also means that all sales literature and technical documents should be in Italian. Translation of technical literature is a job for a person with specialised knowledge in the field concerned. Students of Italian at Oxbridge or Redbrick are unlikely to make a good version of the leaflet describing your high-speed electronic seed graduating machine. Spend a little more money and have them well done by an Italian. It will show that you really mean business.

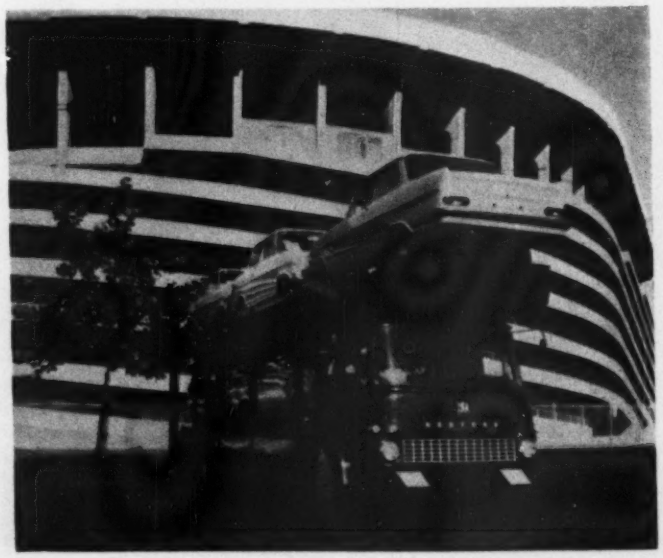
Tell your customer in kilograms, metres, litres and hectares – not in pounds, yards, gallons and acres. Don't expect your prospective customer to get involved in the intricacies of the British system of weights and measures.

For your sales promotion and advertising, use an advertising agency which knows Italy well so that you get the approach right and your budget is efficiently used. Try sharing the advertising cost with your agents. If you make them pay for it all they will refuse or do so unwillingly. If you pay half they will probably think they have made a good bargain. If you pay for it all, this may be a costly precedent for the future.

One final thought

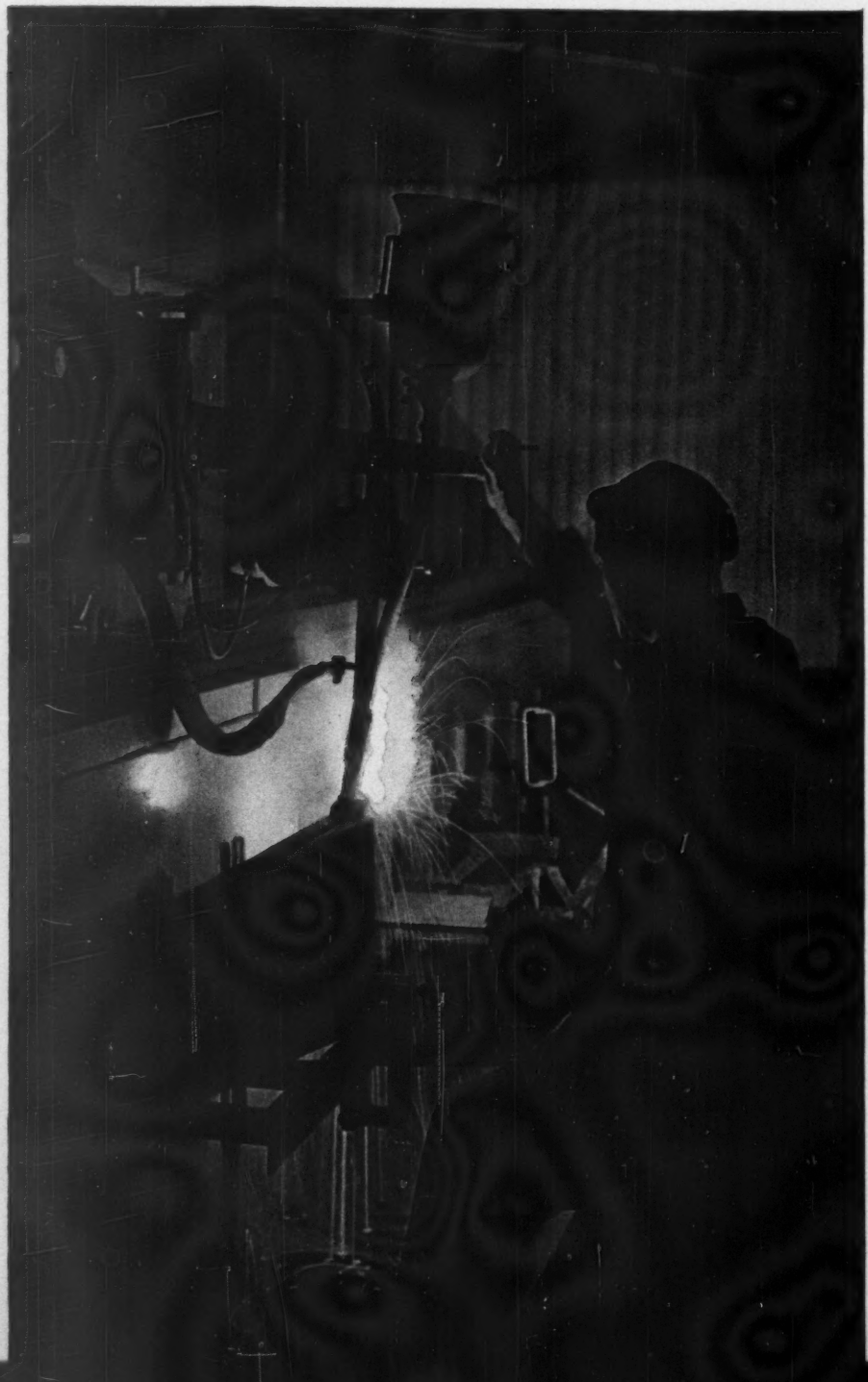
You may well find that a single non-Italian firm is tougher competition than all the others put together. You will need to set your prices and your service to meet this situation. If the non-Italian firm is in a Common Market country then this may be difficult and your only way to compete may be to sell harder than he can. Which brings us back to the beginning – you have to *sell*.

A Bedford TK truck, passing through Italy with a load of Vauxhall cars.



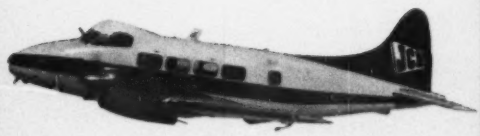
the world's most modern production techniques are employed at JCB®

The combined skill and experience of some 450 technicians and skilled workers, coupled with the world's most modern production techniques, guarantee the reliability and sound quality of every machine produced at JCB Rocester.
Parts must be machined to extremely fine tolerances and the world's most modern machine tools have been installed to ensure both speed of production and consistently high quality. There is at JCB Rocester, the largest batch of Warner Swasey chucking and bar automatics ever to be installed in a factory outside the United States of America. There is a Malcus Grinder from Sweden, and many other fine machines from all over the world.
By combining the very latest automated techniques with the knowledge of highly skilled operators, JCB has achieved the volume production of a machine of hand-made quality.



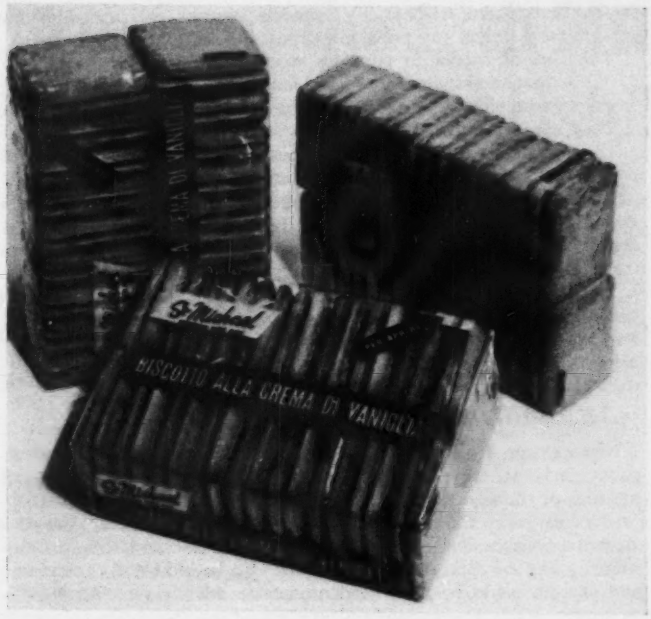
Left below: Submerged arc welding of the lap joints on loader arms.

Below: Roller burnishing of ram shafts.



distributors required

Progressive European companies who wish to expand by selling the world's leading hydraulic excavator should contact: JCB Rocester, Staffs, England.



Left: 'St. Michael' biscuits with special packaging for the Italian market. Marks and Spencer are enjoying considerable success with this line.

Right: Another example of special packaging for the Italian market, this time by Dylon International Ltd. On the right, the original pack for Dylon carpet cleaner. On the left the new pack designed for Italy.

Selling to Italy

by a successful exporter

FEW PEOPLE, when asked what kind of goods Britain exports to Italy, would think of girdles and brassieres—yet during 1963, £94,000 worth of foundation garments were sent to Italy from this country, about 75 per cent of them under *one* trademark.

Since before the war Marks and Spencer have operated an Export Department, selling mainly to multiple stores and groups of department stores in Europe and overseas, amongst them the foremost Italian department store 'La Rinascente' and their associated chain 'Upim'. Executives of that organization visited London two years ago and, after seeing the merchandise on sale and visiting the firm's laboratories, they decided that 'St. Michael' foundation garments were right for Upim's customers.

The first trial order placed was for a few hundred dozen garments only, since, with the relatively high rates of duty and other expenses, the Upim buyers could not be certain whether 'St. Michael' garments would be saleable in Italy. Special packaging had to be created to combine the 'St. Michael' lay-out with Italian text and prices in lire, photographic display tickets with appropriate wording had to be provided, washing instructions had to be translated into Italian, etc.

The campaign was a success. Within a week of its opening, Upim's buyers were sending frantic teleprints for additional quantities.

Since then the 'St. Michael' range has become a permanent feature in Upim's corsetry department, whose own sales, far from declining, have gone up because for the first time the Italian housewife thinks of Upim in connection with foundation garments. The British merchandise has led to an upgrading of the domestic product and of the prestige of the store.

Following this success Upim's food buyers visited London, where they were impressed with the quality and freshness of 'St. Michael' biscuits. Once again, this is not a 'traditional' export to Italy, but today nearly 40 per cent of all British biscuits exported to Italy are 'St. Michael'. Again the ground had to be carefully prepared, special packaging had to be produced which not only gives the name of the biscuit in Italian, but also contains a list of ingredients and other information required by Italian law.

Marks & Spencer stipulated that Upim must observe the 'shelf life' of each line. Each outer carton bears the legend 'Da esaurirsi entro il . . .' (To be sold by . . .) and a date. Marks & Spencer executives visit Italy from time to time and check on this point. The mutual interest of both firms (and thereby of British exports) is best served by selling food lines in satisfactory condition only.

The group of 'Standa' supermarkets became aware of Upim's success with 'St. Michael' biscuits and in their turn visited London. They found the 'St. Michael' range varied enough to supply both firms with different kinds of biscuits and today their purchases equal those of Upim. Standa are also successfully selling two lines of 'St. Michael' confectionery.

Lately yet a third customer has placed orders for Marks & Spencer food lines, the Supermercati Alimentari chain of supermarkets. Apart from biscuits, Marks & Spencer export their tea to Italy through this group.

As with the question of freshness and packaging, a great deal of thought has been given to transport problems. To avoid delay and multiple handling, all food lines are delivered by direct van to a depot in London and there transferred to a trailer which runs non-stop directly to the Milan customs shed within three days. The biscuits can therefore get onto Upim's or Standa's counters within about seven days from baking.

What of the future? Marks and Spencer have every hope of exporting 'St. Michael' knitwear this autumn. Here again, they hope that the quality and finish of their garments, together with their reasonable prices, will open up a new field. At present, this country imports £2,651,000 worth of Italian knitwear and sends only £539,000 worth in return. Marks & Spencer are interested in trying to redress this balance.

Advertising media

by Ray Thompson, Member, Institute of Practitioners in Advertising

THE FIRST FACT to bear in mind when considering the use of advertising in Italy is that an adequate coverage is usually more difficult to obtain than would be the case in Britain.

This statement does not mean that an adequate coverage cannot be obtained but merely that media planning in Italy is more complicated than in Britain.

Here is a brief breakdown of the Italian advertising media pattern.

1. Newspapers

No national newspapers, only regional and local ones. Circulations much smaller than in Britain. (The top Italian daily does not exceed ½ million copies).

2. General interest magazines

Have held their own much better than their British equivalents. All the same, none are greatly in excess of the one million circulation mark.

3. Women's magazines

Good but coverage still limited. Most of them reach upper to lower middle classes.

4. Radio

Very wide coverage but one needs a fairly large appropriation to get adequate penetration. Reaches nearly all classes, but is national in coverage and cannot be zoned to any appreciable degree.

5. Television

Again is national and cannot be zoned. Reaches a wide audience of all classes. Time quite difficult to obtain and advertising messages subject to some quite complicated rules. Can very rarely be used as the basis or mainstay of an advertising campaign.

6. Cinema

Still quite a good medium and is often very effective for reaching good quality audiences in given areas.

7. Posters

Much less disciplined than in Britain. For those products which would benefit from poster advertising in Britain, the Italian equivalent could be a good buy.

8. Trade and technical press

Usually covers less than its British equivalent. There are, however, a few notable exceptions.

9. Trade fairs

Appear to be more widely used than in Britain.

10. Direct mail

More costly than in Britain and is used less widely except perhaps for medical promotion. However, some good lists of addresses are available and several advertisers have built up good business through this medium.

Costs of advertising work out at approximately the same per 1,000 persons reached as in Britain. However, estimating is complicated by various taxes—both the overall turnover tax (IGE) of 3.3 per cent which applies to all transactions, be they advertising or not, and direct advertising taxes which range from 4 per cent to over 20 per cent according to the media used.

Let's take a few examples of advertising problems:

Agricultural products

The problem with selling agricultural products, such as fertilizers or farm machinery, is how to get your message through to the farmers. This isn't so easy since the Italian farmer doesn't read very much and doesn't go to the cinema very often. Local media must probably be used so that TV, general interest magazines or big newspapers, unless for prestige purposes, would be very wasteful.

The sort of media to consider would therefore be:

- local newspapers and local magazines in the farming areas;
- agricultural and technical publications (not a very wide readership);
- billboards and posters; (these could be especially useful for displaying in the agricultural market centres).

This kind of schedule would almost certainly need to be supported by direct mail-outs of leaflets and other material, by exhibitions in the agricultural fairs, and perhaps by particular initiatives such as travelling demonstration vans, technical advice services, etc. This is an example where standard mass media are hardly sufficient to get through to the proverbially suspicious and grumbling farmer. Personal contact, particularly if made in the local dialect, is very important.

Automotive products

Newspapers are indicated for advertising cars and accessories, particularly as they have a substantial male readership. General interest or family magazines might also be used provided their readership is at the right income level. Car magazines like the monthly *Quattroroute*, the weekly *L'Automobile* and some of the sporting and political magazines would also be indicated. Television and cinema could be used to demonstrate advantages effectively – as done recently by Simca. In a way, therefore, the choice of media for this group of products might well parallel a similar problem in Britain except that cinema advertising could be given greater prominence in Italy than would be the case in the Britain.

Domestic appliances

Domestic appliances usually pose a straight-forward consumer advertising problem. Women's magazines and, possibly, general-interest magazines are indicated as first choice. Possibly backing could come from television and newspapers. Extra weight in certain areas could be given by cinema advertising. It should be borne in mind that the influence of the husband in purchases of this nature is much greater than in Britain.

Engineering equipment

Advertising would not generally be a prime factor in selling equipment to industry. However, it could be used with great effect to make the company or product known. A prestige advertising campaign in certain major newspapers could, therefore, play a very useful part in reaching those many senior executives of companies who are involved in the purchase of capital equipment and yet who are not very often seen by the salesmen or sales agents. After all, a senior executive who decides on a major purchase should find it easier to explain to his colleagues if he buys from a well-known and reputable concern rather than from one that is relatively unknown. Many British firms when trading in foreign markets seem to assume that the prestige they enjoy in Britain will also apply to their foreign markets. Sometimes this is true but very often they are relatively unknown. This state of affairs could often be adjusted by advertising. National newspapers could, therefore, be used to build a background of prestige while technical papers could tell a more direct and factual story.

Conclusion

So much for media planning examples. In conclusion, it is strongly recommended that companies who wish to advertise products or services in Italy should make the maximum use of the best professional services available to them.

Experienced and competent advertising agencies are available in Italy. Some of the very best ones are, indeed, British. An exporter to Italy could either establish contact with them through his own British agency or, directly, by getting their names and addresses from the Information Department of The Institute of Practitioners in Advertising, 44 Belgrave Square, London, S.W.1.

Britain at the 13th Milan Triennale and Italian Fairs and Exhibitions

by Export Promotion and Fairs Branch, Board of Trade

THE THIRTEENTH Milan Triennale – the most important exhibition event in the field of industrial design – was opened for four months in June. It has for its theme 'FREE TIME – the Constructive use of Leisure'.

The Triennale, as its name suggests, is usually held every three years, and is basically a thematic exhibition on some aspects of architecture and industrial design. This year is the second time Britain has participated officially in the exhibition; the first occasion was in 1960 when the Ministry of Education sponsored a prefabricated CLASP school which won the Gran Premio, the exhibition's top award.

This time the British exhibit has been arranged by the Council of Industrial Design in collaboration with the Central Office of Information and is sponsored by the Board of Trade. It has been designed by Theo Crosby, ARIBA, FSIA. The British exhibit's aims are (1) to promote British goods, (2) to show aspects of British leisure, (3) to show how official bodies and policies promote leisure activities and (4) to create a complex architectural experience involving British designers, painters and sculptors. The British section occupies an area of some 4,800 sq. ft. in the Palazzo dell'Arte.

The British displays are housed under an unusual and interesting shell of rough timber board with a splendid eye-catching ceiling in tilted planes carrying fragments of packing case lettering and symbols. The theme of exports from Britain is predominant in the exhibit as a whole. This pavilion contains a wide range of indoor and outdoor leisure pursuits and activities selected by COID.

Another side to leisure in Britain – that of looking at works of art – is represented by pieces of sculpture, one of which is by Eduardo Paolozzi and another by Peter Startup; there is a mural by Joe Tilson (who was also responsibile for the great ceiling) and a rug specially designed by Harold Cohen, MSIA. This rug was made by a group of old people in London's East End who meet during their leisure time in the Blackfriars Settlement Workshop.

In the main hall there are five large screens on which are projected a constantly changing series of 350 colour slides depicting British leisure activities. They were specially photographed by Roger Mayne. The pictures are accompanied by music (specially commissioned for the event) on a track which electronically controls the projectors. Life-size photographs show the work of such organizations as The National Trust and The Nature Conservancy.

Paul Reilly, Director of the COID, was appointed by the British Government to be Commissioner for the British section of the exhibition, and the Assistant-Commissioner is J. K. Hanna, H.M. Consul (Information) in Milan.

Fairs and exhibitions

In Britain, major trade fairs and exhibitions tend to be concentrated heavily in London with secondary concentrations in such centres as Glasgow, Manchester and Birmingham. In Italy, principally for historical and commercial reasons, although local prestige plays no small part, the pattern is different. According to the records of Export Promotion and Fairs Branch of the Board of Trade, no fewer than 22 Italian cities have organized trade fairs in the recent past. These have taken the form of both general samples fairs, some of them truly international in character and others largely of regional importance, and of specialized fairs, the range of which covers almost the entire field of imports.

The predominant centre in Italy for these events, whether general or specialized, is Milan. Its International Samples Fair, which covers a total exhibition area of 6 million square feet, is one of the largest trade fairs in Western Europe. The forty-second edition of this fair (the first took place in 1920) was held as usual in the month of April this year and attracted more than 4 million visitors. There were 13,973 exhibitors, of whom 3,670, including 330 British, came from 82 countries outside Italy. The British Consulate-General in Milan regularly organizes an official British Information Office at the Milan Samples Fair.

Specialized trade fairs, both national and international, are held in Milan for such products as cycles and motor-cycles, instrumentation and automation equipment, packaging and food machinery, toys, leather goods, dress and furnishing fabrics, etc. In addition the city is justly famous for its Triennale, a thematic exhibition rather than a trade fair, which is the leading event in the world in the field of industrial design.

The second largest trade fair in Italy is the annual Levant Fair in Bari which attracts many visitors from North Africa and the Middle East. The only specialized fair of any importance in Southern Italy is the Foggia Agricultural Fair. The Bari Fair is accordingly important for those exhibitors looking towards the Southern Italian market.

Other general samples fairs which are particularly important for the regional markets in which they are held include the International Samples Fairs at Padua, Trieste and Bolzano. For Sicily the Fiera del Mediterraneo at Palermo is the major event.

For specialized fairs Turin is another of the more important centres. Since the city is the hub of the Italian motorcar industry, the main event is, not surprisingly, the annual International Motor Show. Other notable specialized fairs held in Turin are the annual International Technical Exhibition, the biennial International Aeronautical Exhibition and the International Clothing Exhibition (SAMIA), visited by clothing buyers from all over Europe.

Genoa has recently staked out its claim as an exhibition centre and has built some first-class exhibition buildings which the USSR chose as the site for an elaborately staged Industrial and Commercial Exhibition in April this year. As befits a major sea port, trade fairs in Genoa have concentrated on the theme of communications; apart from the annual International Boat Show, an international fair devoted to marine transport, telecommunications and aeronautics has recently been held in the city.

Very few trade fairs are held in Rome, although the International Exhibition of Nuclear Energy, Electronics and Television is an event of some importance.

As regards agricultural fairs, the largest Italian function of this kind is the Agricultural Fair at Verona.

Other important specialized trade fairs include that for preserved foods held in Parma and an international foodstuffs Fair in Bologna. Florence is the centre for international fairs of handicrafts, shoes and leather goods. A household goods fair, the Fiera della Casa, takes place in Naples, and Ancona is the site of an annual fair for fishing and nautical sports equipment.

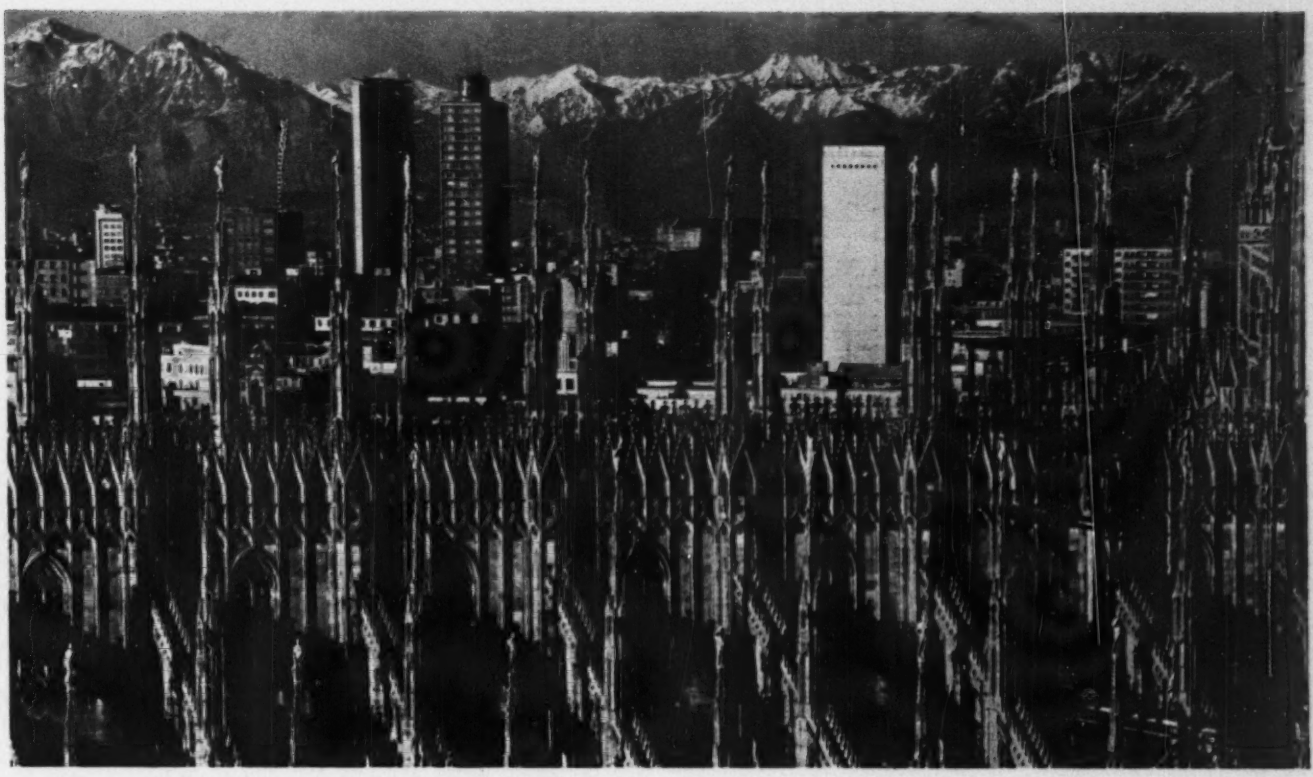
Full information can be obtained from the Export Promotion and Fairs Branch, Board of Trade, Queen Anne's Mansions, Queen Anne's Gate, London, S.W.1. Tel. Abbey 7877, Ext. 2783.

A list of Italian trade fairs follows overleaf.

Title	Frequency and Date	U.K. Agent or Italian Organizers
ANCONA		
International Fair (Fishing & Nautical Sports).	Annual; June-July	Fiera di Ancona, Ancona.
BARI		
International Levant Fair	Annual; September	Du Mont Publicity Co. Ltd., 18 Queensberry Place, London, S.W.7. (Tel. Kensington 1700).
BOLOGNA		
International Food Exhibition.	Annual; May	Finextra Ltd., 213-214 Piccadilly, London, W.1. (Tel. Regent 3944).
BOLZANO		
International Samples Fair.	Annual; September	Fiera Campionaria Internazionale di Bolzano, Bolzano.
FLORENCE		
International Handicraft Fair.	Annual; April-May	Mostra Mercato Internazionale dell'Artigianato, Piazza della Libertà, Florence.
FOGGIA		
Spring Agricultural Fair	Annual; April-May	Ente Autonomo Fiera di Foggia, Corso Vitt. Emmanuele, 8, Casella Postale N.78, Foggia.
GENOA		
International Boat Show	Annual; January-February	Admiral A. L. P. Mark-Wardlaw, Loseberry, Claygate, Surrey. (Tel. Esher 2882).
MILAN		
International Trade Exhibition for Clothing and Furnishing Fabrics (MITAM).	Biannual; June and November	Mrs. Ruth Stewart, 12 Montagu Mansions, York Street, London, W.1. (Tel. Hunter 4100).
International Cycle & Motorcycle Exhibition.	Biennial; November-December	National Association of Cycle, Motorcycle & Accessories Manufacturers, Via Mauro Macchi 32, Milan.
Instrumentation & Automation Exhibition.	Biennial; October-November	Strumentazione & Automazione, via Marcona, 15, Milan.
International Packaging, Mechanical Handling, Industrial Machinery and Food Processing Exhibition (IPACK-IMA).	Annual; June	IPACK-IMA Exhibition, Via Gian Giacomo Mora 13, Milan.
International Samples Fair.	Annual; April	Dr. V. Schiazzano, Italian Chamber of Commerce for Great Britain in London, 31 Old Burlington Street, London, W.1. (Tel. Regent 2411).
The Milan Triennale (International Exhibition of Modern Decorative and Industrial Arts and of Modern Architecture).	Triennial; May-September	Secretary, Triennale di Milano, Palazzo dell' Arte al Parco, Milan.
PADUA		
International Samples Fair.	Annual; May-June	Fairs and Exhibitions Ltd., Walmar House, 288 Regent Street, London, W.1. (Tel. Museum 5153/5).
PALERMO		
International Mediterranean Fair.	Annual; May-June	Fiera del Mediterraneo – Campionaria Internazionale, Piazzo Generale Cascino, Palermo.
PARMA		
International Foodstuffs and Packaging Fair.	Annual; September	Dr. V. Schiazzano, Italian Chamber of Commerce for Great Britain in London, 31 Old Burlington Street, London, W.1. (Tel. Regent 2411).
ROME		
International Exhibition of Electronics, Nuclear Energy and Television, Radio and Cinematography.	Annual; June	Fairs and Exhibitions Ltd., Walmar House, 288 Regent Street, London, W.1. (Tel. Museum 5153/5).
TRIESTE		
International Samples Fair.	Annual; June-July	Dr. V. Schiazzano, Italian Chamber of Commerce for Great Britain in London, 31 Old Burlington Street, London, W.1. (Tel. Regent 2411).
TURIN		
International Aeronautical Exhibition.	Biennial;	Dr. G. Boella, Fiat (England) Ltd., Water Road, Wembley, Middlesex. (Tel. Perivale 5651).
International Clothing Exhibition Mart (SAMIA).	Biannual; March & October	Mrs. Ruth Stewart, 12 Montagu Mansions, York Street, London, W.1. (Tel. Hunter 4100).
International Motor Show.	Annual; October-November	Comitato Organizzatore 370, Internazionale dell Automobile, Corso Galileo Ferraris 61, Turin.
International Technical Exhibition.	Annual; September	Dr. G. Boella, Fiat (England) Ltd., Water Road, Wembley, Middlesex. (Tel. Perivale 5651).
VERONA		
International Agricultural and Animal Farming Fair.	Annual; March	Secretary-General, International Agricultural Fair, Palazzo del Pallone, Verona.

Top: Mr. Alan Green (centre), then Minister of State to the Board of Trade, with Sir John G. Ward, HM Ambassador, Rome (right), at the stand of Argon Services Ltd., displaying labelling equipment at the Milan Fair in 1963. HM Consul (Commercial) Milan, Mr. W. N. R. Maxwell is shown left.

Below: Last-minute check on the 220 square foot carpet they have designed for the British Pavilion at the Milan Triennale by painter Mr. Harold Cohen and textile designer Mr. James Park at the Blackfriars Settlement in London.



An impressive view of Milan, medieval and modern.

Milan—a market for consumer goods

by HM Consulate General, Milan

THERE ARE FASHIONS in export promotion as there have to be in any developing activity; it is only by trying one method after another that technique makes perfect. So, since the war, the British export effort abroad has taken various forms. There have been big international trade fairs at which Britain and many other nations have had imposing national pavilions thronged with people which did not always sell very much; there have been store promotions which did sell, but only over a limited range of goods; and there have been standing exhibitions which started well but in time lost their novelty. And now for capital equipment there are specialized trade shows, and for consumer goods there are to be British 'saturation' weeks.

These British weeks probably had their origin in the retail trade displays which were linked to such occasions as major naval visits when it was found that a spectacular show, preferably with a touch of pageantry, could catch the public imagination, and if well supported with goods and display material – but especially goods – could give quite a shot in the arm to our export sales in the country concerned.

Now this technique has been developed to a point at which, given a suitable city, the effect which is aimed at and which can be produced for a short period is of a sort of peaceful invasion or taking over of the central shopping area, and this again with a very thorough stocking up of goods in the shops, can have a very big impact of the retail sale of a wide range of consumer goods. This process was carried out successfully (in conjunction with a trade fair) at Zurich last September, and British Weeks on these lines are, at the time of writing, in preparation for Copenhagen and other Danish cities, and Amsterdam (a highly successful British Week in Dusseldorf has already taken place). The next city scheduled for this friendly assault, on a scale never attempted before, is Milan in the autumn of 1965.

Milan is the example *par excellence* of the European consumer market of today. Whatever the method used to promote the sale of British goods here, there can be no doubt that Milan is an ideal target for the British exporter to aim at, provided that he realizes that it is a hard sell in face of all the world's competition – from the Six to Hong Kong and Japan – with everyone chasing big business and many of them getting it. There is no place here for the mediocre but always one for the novel, for the high quality and also for the bulk selling lines that offer good value for money.

For centuries Milan has been the greatest commercial centre of the Po Valley but that in itself would not qualify if for special attention today. The expression so often used by new arrivals is that Milan seems to throb with economic activity (and also with stationary traffic). People come here to make money and stay here to spend it, and the most important thing about the Milan consumer market is the expansion in demand which has taken and is still taking place. The effect of Italian economic policy during 1962 and 1963 was quite simply to put money into the pockets of most of the Italian industrial workers, money which had never been there before, and the result has naturally been a great increase in turnover in all sorts of shops. Italian imports rose last year by no less than 24 per cent but those from Britain by only 19 per cent.

To deal first with the luxury market, Milan has always had a thick uppercrust. It is famous for the wealth of its great industrialists and merchants and the Milanese have always been big spenders. On a fine winter's day in the short Monte Napoleone, the Bond Street of Milan, you will see more fine furs per square metre than are worn anywhere outside a mink ranch. Today the rich are getting richer and more numerous than ever before and they are also completely cosmopolitan in their tastes. With the ease and

speed of air transport and the falling tariff and customs barriers, these people buy where it suits them and what suits them, and they buy the very best. However, though they may buy their suits in Savile Row, most of their purchases are made in their own city and it is there that the goods must be brought to them. So much for the rich man's market; all that is needed there is really high quality goods, characteristic, novel and smart, and a well-established agent. The prices do not really matter.

But the big time in Milan is not really in selling to the rich but in selling to the many. It is the three and a half million Milanese in Greater Milan whom we have to reach in order to give a really upward thrust to the British export statistics, and the great thing about the present time is that the Milanese are now ready to meet the seller half way. From their side the public have every reason to buy. They now have the money that they have not had before; the needs were always there. On the debit side they see inflation, now running at roughly 10 per cent per year, taking their spending power away from them fast; so no one saves in the form of cash. Thus the situation should be a salesman's benefit except, as has already been said, for the competition. This competition must and can be faced and, even outside the top quality goods, novelty and originality will sell if the difference in price is not too marked. It is surprising in this context of consumer goods how little effect on the whole the preferential tariff of the Common Market seems to have.

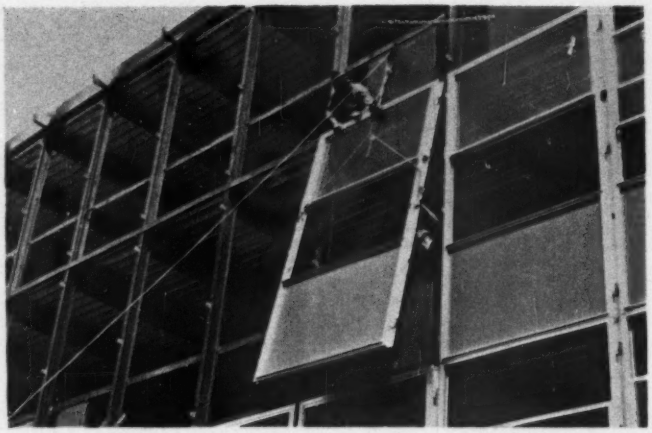
The province of Milan covers an irregular circle of about 30 to 40 miles in diameter across the centre of the city and within this area live 6 per cent of the Italian population. However, the important thing is that among these are included roughly 1 million industrial workers, over 16 per cent of the industrial workers in the whole of Italy. This preponderance of thriving factory workers sets the pattern of the needs of the area. These people together with the traders who supply them with goods and services are the new 'haves' whose purchasing power *per capita* has risen so sharply and is now said to match the Swiss.

And what is it that the typical Milanese family is ready to buy? The answer is very wide indeed, but it is generally whatever middle-class people and factory workers in England would buy. Not always the same styles and colours, particularly in men's wear, as they would buy in England but articles which fill the same need. Italian preference for tailor-made suits for men and dressmakers' dresses for women is now giving way fairly rapidly as ready-made clothing of all sorts improves in cut and quality. However, particularly in men's wear, the Italian ready-mades have still some way to go before they reach British standards.

The customs heading showing the largest increase in imports during 1963 was foodstuffs which represented two-fifths of last year's total rise in imports. It is natural that rising incomes should call for more and fancier foods: meat preserved and fresh, tinned and bottled goods, biscuits and jams, a very wide range of delicatessen and, just recently, certain types of frozen foods. The supermarket is only just beginning to play its part in the Milanese distributive system but it is the channel through which many of the foreign foodstuffs which are not well known in Italy are put on display and are sampled by the public.

Another factor, taken for granted in Britain but new to Northern Italy, is the disappearance of the domestic servant. This is a by-product of the economic miracle which, by offering freer working conditions and sometimes more money, swept the girls who would have been servants into the factories. The result is that the housewife does her own shopping and cooking; and she is naturally more adventurous in her purchases than the maid used to be and more susceptible to attractive looking novelties, especially if they are quick and easy to cook. This last point is important because increasingly the housewife has a job as well as her husband, leaving her with very little time though plenty of money.

The typical Milanese family lives in a flat, usually rather a small flat in the suburbs, and here their needs include small domestic equipment, both electric and mechanical, and labour-saving devices of all kinds – anything from the electric floor polisher and the electric iron to the meat slicer and the patent tin opener. The flat will of course also have its refrigerator, its television set and probably its washing machine, but the chances of breaking into the market for these items, in face of the fierce competition of the many Italian manufacturers whose products are famous all over Europe, are small unless the equipment is manufactured or assembled in Italy. There ought also to be a market for dish-washing machines because one thing is certain in an Italian home: father will not dry up. But in fact these machines have not caught on so far – perhaps because they are still expensive. Other items in demand for the home are of course glass and china (where the high-quality British products are very much appreciated by those who can afford them), and also toys and an increasing range of sports equipment.



Beclawat-Aia windows as fitted in prefabricated schools at Turin, Milan, Naples and Palermo. The windows are made by Beclawat (Architectural) Ltd., London.

To complete the picture of the average Milanese family we must go outside the little flat and down in the lift to the street where the small family car, probably garageless and parked upon the pavement, is an essential element of life which seems rather more valued than it is in Britain and correspondingly taken more care of. The recent Government restrictions to curtail inflation have put a temporary check on the motor trade but Milan with its teeming city traffic and over-loaded *autostrade* remains a very good market for cars and also for all sorts of gadgets and accessories of which Italians seem very fond.

To sum up then, the City of Milan and a large area round it offers a fine market for a wide range of consumer goods of both high and medium qualities. Price is naturally an important factor, particularly in the field of domestic equipment and supplies, but originality and quality are at least equally important in respect of all types of clothing. If British firms in any doubt about the suitability of their goods to this market will send details of them to the Commercial Section of the British Consulate-General, via Gabba 1/A, Milan, we will gladly make some soundings on their behalf and give them all the advice we can, suggesting the names of potential agents if there is a chance of good business.

There are also just a couple of reservations to be made. Milan is a big and very busy city and its commercial people are run after by would-be suppliers from all over the world, and similarly the Milanese press, both technical and otherwise, has all the material it can cope with and more. This means that in general new products can seldom be launched successfully by calling the trade and press together to be told all about it at a hotel reception. Hotel receptions are good for renewing friendships on such occasions as a managing director's annual visit but they will not draw people to a firm or a product that they do not know already. The sales promotion of new consumer goods is usually better achieved by appointing a good agent and supporting him in due course with such advertising by press, T.V. or radio as the probable volume of business makes practicable.

And finally, do not fit your first or any other visit to Milan into a summer holiday trip to Italy. The tempo of this throbbing city slows down from mid-July to mid-September and for three weeks in August the place is as dead as a hot graveyard.

How to send goods to Italy

by E. F. Keat, British Commercial Transport Co. Ltd.

One of four delivery vans operated by Bevan Funnell Ltd., Newhaven, taking exports of period furniture to Milan via Antwerp, Germany, Austria and the Brenner Pass. The company exported period furniture worth nearly £60,000 to Italy in the year ended October 1963, and now has its own storeroom in Milan.

NO COMPLICATED PROBLEMS are involved in shipping to Italy. The following summary of the various alternative methods should help exporters in deciding that most appropriate to each individual case:

(a) **Overland services.** Regular 'Complete Trucks' (for large shipments); 'Groupage Trucks' (combining smaller shipments into one complete truck load).

(b) **Direct steamer.** Regular liner services from most important British ports to the main Italian ports.

(c) **Air service.** Regular direct flights mainly from London to Milan, etc.

(d) **Direct international lorry trailer services.** Mostly operated via the 'roll-on' 'roll-off' ferries; suitable for shipments of 10 tons upwards.

Times of transit and loading frequencies

The regular liner services do not depart on a timed schedule but normally are available once or twice weekly from London, approximately once weekly from Liverpool, and approximately fortnightly from Hull. There are also sailings from several other ports.

The duration of the voyage varies according to the number of ports of call, but averages between nine and fourteen days to Genoa, twelve to seventeen days to Leghorn and fourteen to nineteen days to Naples.

Various types of overland services are principally operated by forwarding agents specializing in this particular method of despatch. Direct train ferry trucks leave certain London stations for Italy every day. The average transit time to arrival at the Italian frontier is five days without transhipment en route. The groupage services previously referred to are mainly arranged in London, but complete truck loads of five tons upwards can be loaded at any goods station.

Other overland services provide for shipment to a northern European port and onward despatch either by rail or by road transport.

Air services: most direct freight flights operate from London to the principal Italian cities, but it is also possible to despatch from provincial airports, usually with transhipment in London to a direct flight. Some freight is carried on passenger planes.

International road trailer services are useful for complete loads, the advantage being that the trailer can be sent to the factory and loaded there, thus reducing packing considerably. This method is usually rather more expensive than other overland services. Transit is quite rapid which can be useful for large shipments where speed of delivery is more important than cost.

Comparative costs

The direct steamer services would normally be cheaper for heavy consignments with favourable measurement in relationship to weight. However, as steamer freight rates are mostly based upon the ton weight or 40 cu. ft. measurement (whichever is the greater), where goods measure appreciably more than 40 cu. ft. to the ton weight, the overland services may be cheaper as, other than for exceptionally bulky goods, overland traffic is normally charged on the basis of the weight rather than the measurement, and often simpler and cheaper packing can be used.

Air service, except for very small packages, is normally more expensive, although rates are progressively being reduced, especially for larger quantities. Exceptional rates also exist for certain commodities.

Direct international lorry trailer services are usually rather more expensive, particularly for bulky loads, the cost being based upon the carrying capacity of the trailer involved, irrespective of the weight of the cargo.

Bills of lading

For direct steamer services, the steamship companies issue their own bills of lading.

For overland services, most forwarding agents who specialize in this work issue their own forwarding agents' through bill of lading to the internal destination.

For air services, bills of lading are not normally issued as the shipments might arrive before the documents. It is therefore advisable to make payment arrangements with clients which do not necessitate production of a bill of lading.

For direct international road trailer services, it is not normally possible for a bill of lading to be issued since this would involve unloading the trailer, and would thus destroy the object of the quick service.

The foregoing is necessarily only a resumé of some of the most usual methods of transportation but shows that there is quite a wide choice. If an exporter has any doubt about the best service to use, any of the many reputable forwarding agents will be pleased to give advice.

Design in selling

by Paul Burall

THE APPRECIATION OF GOOD DESIGN in Italy is based on centuries of experience of beautiful paintings, fine architecture and gracious furniture. It is therefore not surprising that Italy's new-found prosperity is both producing some outstanding design work and creating a massive demand for well-designed products. This demand cannot at present be met entirely by Italian industry and consequently imports into Italy rose by 26 per cent last year.

Good design in British goods plays an important part in winning a greater share for Britain in this expanding market. One of the most important reasons for this is that the great increase in consumer demand in Italy, is by industrial workers who are for the first time able to afford such items as refrigerators and new furniture. These buyers want the goods they purchase to look both very new and very modern: they want their affluence to be apparent to all.

But the demand for good design goes deeper than this, for a flair for understanding and creating good design is deeply embedded in the Italian character. There are three fields in which Italian design is especially renowned; architecture, clothing and cars.

During almost any discussion on modern architecture, Italy will enter the conversation. In Milan alone, heart of the prosperous industrial north, there are many good examples of two of the most modern architectural styles: the Pirelli building is world-famous for its elegance, while at the other extreme there is the Torre Vellasco, a tower designed in a ultra-modern manner to achieve the greatest possible utilization of space with little regard to conventional aesthetics. In clothing, the Italian influence is so great in the teenage market that £26 million worth of shoes, clothing and fabrics were imported into Britain from Italy in 1963. In car design, too, the Italian influence has been considerable. The British Motor Corporation in particular have co-operated with Farina in the styling of many of their models, a number of which are being built in Italy with very few design changes; the A40 was the best-selling foreign car in Italy for many months.

The common factor in Italian design in all these fields is flair and originality, a desire to experiment and to create new ideas. This stimulating approach to design runs throughout the manufacturing process, from the actual designers through to the general buying public. The difference between the approach of the Italian public to design and that of the British public is perhaps best summed up by the reasons for Italy's lead in car design. In Britain, those people who want an expensive car have it specially coach-built to include such luxuries as television sets and cocktail cabinets; but the external appearance of the car remains similar to that of every other car of the same model. The rich Italian also takes his money to the coach-builders, but his aim is to obtain a car which looks unique and which expresses his own individuality. This has enabled Italian coach builders to experiment in a way impossible in Britain and it is this experience, when applied to mass-produced cars, which has given the Italian designers their lead. This parallels the pioneering of engineering developments through racing and rallies.

Of course, some of the experiments lead up blind alleys. There are plenty of Italian products – especially in the consumer-durable field – which express Latin exuberance in an extreme form. Novelty is sometimes prized above reliability, but there is no denying the brilliance of the best of Italian design.

What can the British manufacturer wishing to increase his sales

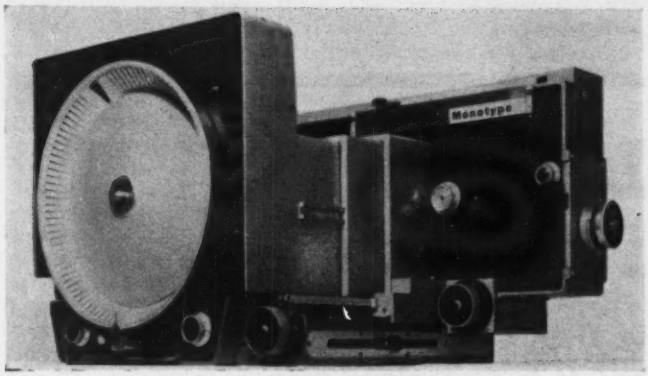
Page 43 (top right)

HRH Prince Philip receives from Count Aldo Borletti, President of the famous Italian department store La Rinascente, a specially bound book on the history and work of the Council of Industrial Design to commemorate the award to the CoID of the Grand Prix La Rinascente Compasso d'Oro (La Rinascente Great Golden Compasses Award) of 1959. The ceremony took place at the Design Centre last autumn in the presence of the Italian Ambassador, HE Signor Pietro Quaroni.

Page 43 (lower)

Monotype photo-lettering machine.

Below: Bach model clavichord, designed by John S. P. Morley for Morley Instruments Ltd., London. This instrument and the Monotype machine opposite are both featured at the Milan Triennale.



in Italy make of this situation? The flair and desire for visual originality which is so apparent in Italy does not readily appeal to the British temperament. Indeed, when it comes to such industries as engineering, some British firms, while incorporating the latest and most progressive technical innovations with their products, do not at the same time carry out the sort of radical redesign that would emphasise the excellence of the product and make it even more attractive in overseas markets. In the consumer field, Britain's reputation abroad is largely based on her traditional products, and the market for these will predominate for many years; but the demand for products of modern design is likely to expand.

The problem which Britain faces under these circumstances is one of carrying forward her traditional reputation. Dr. A. Giaroli, the delegate in Britain of the Italian Institute for Foreign Trade, believes that the image which most Italians have of Britain and her products is some forty years out of date, of a nation held back by conservatism and traditionalism. The quality of her goods is not questioned, but their frequently dated appearance gives many of them an ill-deserved reputation for a lack of inventiveness and innovation. Dr. Giaroli suggests that, in Italy, the United States has the reputation for manufacturing goods which make life easier, while the Scandinavian countries are considered to contribute most to making life better. If Britain can add to her reputation for quality a similar reputation for being sophisticated and modern her exporters will benefit enormously, both in Italy and elsewhere.

Currently leading the way in setting out to earn this reputation for Britain in Italy are the tailors of Savile Row. By using high-quality cloths in quiet but very modern styles, they have made British suits the natural choice of the sophisticated Italian who wants to dress elegantly.

Even in the field of architecture it is possible for Britain to make a mark. In 1960, at the twelfth Milan Triennale – the world's leading exhibition in the field of design – the Ministry of Education won a major award for the CLASP school. The thirteenth Triennale which opened in Milan a few weeks ago has the theme of 'Free time: the constructive use of leisure' and again includes a British section which has been arranged to give an impression of the variety and vivacity which makes up the leisure scene in Britain. The actual exhibits include well-designed leisure goods of many kinds, from a dinghy and a caravan to toys and gardening equipment; a number of works by young British artists are also on show at the Triennale. The whole section adds up to a view of a Britain which is alert and making energetic progress industrially, artistically and socially.

All this is helping to give Britain a new reputation in Italy for producing modern products, a reputation which can assist manufacturers to increase their sales in Italy.

In many fields of domestic consumer goods, particularly electrical equipment, this means making products look as modern as they are and being adventurous without sacrificing quality. In Italy, buyers rarely have a fixed impression of what a product should look like: they would rather it looked new than hark back to earlier models. An everyday item which demonstrates this is the electric iron : in Europe, many electric irons have cantilever handles, which are just as simple as the old type but which immediately make the iron look easier to use and more up-to-date.

Of course, many manufacturers in Britain are already taking advantage of the skills of industrial designers to make their products look as good as they are. Typical is a firm manufacturing printing machinery which has been making typesetting machines for more than sixty years. Recently a revolution in typesetting has begun, with composing on two-dimensional film replacing the familiar three-dimensional type. The firm has marketed a number of these film-composing machines and among these is the photo-lettering machine illustrated here, a machine which, without being flashy in any way, looks as if it has been made for the push-button era. The good design of this machine makes it that much easier to convince printers in Italy and elsewhere that this machine is as up-to-date as any on the market.

But good design implies much more than just making the product look elegant and modern. It means that the machine or product will do its job well and efficiently, for design includes the need to ensure that dials can be read quickly and accurately, that controls are easy to find and use, and that the needs of cleaning and maintenance have been properly considered. Everything to do with the product should be well-designed. The printing and packaging which manufacturers use should look as modern as the machine, as they are often the first, and sometimes the only, representatives of the firm that the customer sees, and it is therefore as important to have them well-designed as it is to have a salesman well-dressed. This is especially vital in Italy, where the standard of graphic design is frequently brilliant.

The Italian market, then, is one which is very conscious of design and one which is becoming more sophisticated in its tastes as a high standard of living becomes more general. Under these circumstances the best design policy which can be followed by British manufacturers is one which will help Britain foster a reputation for being adventurous without sacrificing anything of her tradition for quality. A reputation for a sophisticated, quietly modern, approach to everyday problems will serve Britain best in Italy, and elsewhere, for as European affluence comes of age, the market for elegance is likely to expand even faster. The best of British design is already finding its market in Italy, where restraint is not a home-grown asset: thus trade between Italy and Britain is likely to thrive on an exchange of modern styles.

Genoa and the Ligurian coast

by H.M. Consulate General, Genoa

LIGURIA IS A NARROW crescent-shaped mountainous stretch of coastline extending from the French frontier west of Ventimiglia to the borders of Tuscany. It comprises the four provinces of Genoa, Imperia, Savona and La Spezia, with a total population of 1¼ million, of whom nearly half live in Genoa. Liguria's other main towns are La Spezia (still one of Italy's main naval bases, and also an expanding commercial port), San Remo, Savona and Imperia. Along the coast, on both sides of Genoa, is the 'Italian Riviera', which despite a recent decline in visitors from abroad, is still one of the main tourist areas of Italy.

Apart from tourism the economy of Liguria, other than Genoa, is based on the cultivation of cut flowers – which are exported in large quantities, mainly to Northern Europe – and, though to a steadily diminishing extent, on olives. Apart from a very narrow coastal plain, the whole of Liguria is mountainous and there is very little scope for agriculture. Consequently, Liguria has had for centuries to look to the sea for its prosperity, and this is reflected in its shipyards, centred in Genoa but also in smaller places along the coast. Fishing on a commercial scale is strangely neglected, however, and most of the fish on sale in the shops of Genoa comes either from the Adriatic or is deep-frozen.

Genoa is by far the most important industrial and commercial centre, its port being not only the largest in Italy, handling some 21 per cent of all the country's imports and exports, but – equally with Marseilles – the first port in the Mediterranean. Traffic in the port of Genoa has jumped in the past ten years from 9 million tons to some 30 million tons annually, and about half a million passengers pass each year through the port, which is the Mediterranean terminal for the 'Italia' line (whose new flagship 'Michelangelo' is at present being fitted out in the Ansaldo dockyards in Genoa) and others of the big Italian shipping companies. Genoa serves the principal industrial areas of Northern Italy and, until latterly, had a substantial share of Switzerland's import/export trade. (This has now been largely lost, mainly to Rotterdam.) Development of the port has latterly been seriously handicapped by lack of space, and its facilities have, on occasion, proved inadequate to cope with the traffic, particularly as regards grain imports. The Genoa Port Authority has a 10-year plan for extending and improving the port facilities and its communications.

At present the lack of adequate road and rail communications is one of the main problems facing Genoa and Liguria as a whole. New *autostrade* are planned which will help to relieve the present congestion, but owing to engineering and other difficulties this cannot happen for another two or three years. The lack of suitable building space within the city area has brought all manner of problems to Genoa's industrial expansion. The new Genoa airport (which has a direct service with London) and the fine new fair grounds, at which international boat shows and other exhibitions are held, have been wholly constructed on land reclaimed from the sea.

Shipbuilding and electro-mechanical engineering constitute the principal local industries, the Ansaldo shipyards at Genoa and La Spezia being known throughout the world. Genoa also has the largest steel works in the country, the State-controlled Italsider group (of which the steelworks form part) having their headquarters in Genoa. There are a number of oil refineries, and pipelines are under construction to carry crude oil from Genoa to Germany, Austria and Switzerland. One of Italy's main sugar refineries is in Genoa and there is a varied assortment of other industries, though most are relatively unimportant.

Genoa has, since the days of the Crusades, had close relations with Britain, the city's flag being the Cross of St. George. The number of local British firms has declined, but there are still British interests in local shipping agencies, and many local firms engaged in general import/export business have well established connections with Britain. The breakdown of the negotiations for British membership of the Common Market caused considerable dismay in Genoese business circles.

Although the main Italian industries are now centred in areas such as Milan and Turin, a high proportion of Italian importers still have their headquarters in Genoa with, in many cases, branch offices elsewhere. The local market offers openings not only for all types of marine equipment and supplies, but for industrial equipment in general, either for use locally or for distribution throughout Italy. Items of special potential interest to British exporters are marine instruments, heavy port lifting equipment. electronic control equipment for marine and industrial use, and also wines and spirits for the ship-chandling trade which is largely centered in Genoa. British knitwear of cashmere and Shetland wool is also in great demand here, particularly by the many 'boutiques' in Ligurian tourist centres.

Despite the recent steady increase in prices, the general standard of living in this corner of Italy is high. There is an increasing demand for consumer goods of all types and although the Genoese are by character strongly individualistic and normally prefer dealing with small retail shops rather than with chain stores and supermarkets, the latter are gradually developing here, though slowly. Liguria is from its geographical position to a large extent a distribution centre for imports rather than a consumer market but, particularly in the case of goods arriving by sea, the appointment of a national sales agent with headquarters in this area can be advantageous.

Lombardy and Piedmont

by H.M. Consulate General, Milan and H.M. Consulate, Turin

ALMOST ANYONE who has seen a map of Italy knows where to find Lombardy and Piedmont. The two regions form the greater part of the broad valley of the River Po, which stretches from the French Alps to the Adriatic and is flanked by the Swiss Alps to the North and the Apennines on the South. Together, Lombardy and Piedmont have an area of 20,000 sq. miles (twice as big as Wales) and a population of over 10 million (more than that of Belgium).

Ever since the reunification of Italy, one hundred years ago, Lombardy and Piedmont have been the workshop of the peninsula. But the years since the last war have seen an astonishing transformation in North Italian industry, which before 1939 was relatively weak and heavily protected against foreign competition. Generous American aid in the immediate post-war period, the discovery of natural gas and the exploitation of Alpine hydro-electric power have all led up to the 'Italian economic miracle'; but most important in the north of the country in particular have been the energy and ability of the Italians themselves and during the 1950s the great reserves of manpower which came up from the south and into the cities from the countryside. This labour supply is now running out: hence the rising cost of labour in Lombardy and Piedmont which is now at levels comparable with those in Great Britain or in Germany.

Agriculturally also the area is of considerable importance because of its rich alluvial soil and the easy physical terrain. The two regions produce nearly 90 per cent of Italy's rice, more than 40 per cent of her cattle and large quantities of wheat, maize and wine. But there is no denying that agriculture in the north of Italy has failed to keep up with the progress of industry. Due partly to the social structure of country life and the drift of the best labour to the towns, and partly to the unwillingness or inability of farmers to invest in improvements on the land, farming productivity has risen relatively slowly; and the nation is having to pay for large quantities of imported food.

However plans for agricultural reform and investment are under way, and there is no doubt that the agriculture of Lombardy and Piedmont is particularly suitable for mechanization. There is already a market for British agricultural machinery here and it should expand as modernization progresses.

Industrially the two regions of Lombardy and Piedmont have seen astonishing growth in the past 15 years. There is relatively little extractive industry, but an immense range of manufactured goods is produced. The two great urban centres, Turin and Milan, are surrounded by rapidly growing industrial townships, and the *autostrade* which link the larger towns are flanked by factories and workshops.

Diversity of industry

The list of even a few of the products of the two regions is impressive. From Turin come FIAT and Lancia cars and many subsidiary products of the motor and metalworking industries. From Ivrea, Olivetti typewriters, and from Biella, a wide range of woollen textiles. Montecatini chemicals are manufactured at Novara, Necchi sewing machines at Pavia and textiles and textile machinery at Busto Arsizio. The silk centre is Como, and Varese and Vigevano are major producers of shoes and leather goods.

For Milan itself anything like a complete list of the larger industrial undertakings would run to pages but among the most famous names are Breda, Falck, Pirelli, Alfa Romeo, Innocenti, Montecatini, AGIP, Marelli, O M and Snia Viscosa. There are also very many secondary industries in the area surrounding the city, including the famous Italian manufacturers of the electro-domestic equipment which has caused such havoc in France and other parts of the Common Market.

What all this amounts to in statistical terms is that 34 per cent of Italy's Gross National Product comes from the two regions and that productivity per head of the population in these parts is more that 40 per cent above the national average.

The rapid and continuing growth of North Italian industry means that there is already a flourishing market for British goods–and this market is far from saturated.

In the first place there are opportunities for the sale of capital goods. Their economic 'miracle' took the Italians themselves by surprise, and Lombardy and Piedmont still lack a communications network which can cope with the demands of 1964. Plans exist for the modernization of the existing *autostrade* and the construction of an additional network linking the industrial centres with their ports and their markets north of the Alps. In addition to this general problem of communications, every sizeable town in Lombardy and Piedmont is having to face the responsibilities which come with economic development and prosperity. Housing, traffic, schools and hospitals, drinking water, sewage, air pollution: these confront, and at times seem to baffle, local government in Northern Italy. Immense sums will be spent in trying to overcome these difficulties, and British exporters may be particularly well qualified to benefit, because their experience and the solutions they have found to such problems are widely respected in Italy.

But Lombardy and Piedmont are above all a market for consumer goods. If industrial production has doubled in the past 11 years, wages have increased even more. And wages in Lombardy and Piedmont are 45 per cent higher than the national average for Italy.

This means that for the first time the majority of families in the north of Italy can expect to own a car, to look for better housing, household goods and clothes, to buy better food and to spend more money and time on relaxation. No one is going to throw their hard-earned money away, but people in the north of Italy are less inclined than they were either to invest it or to buy the cheapest goods available. If imported goods can offer better quality or design, they will sell even if they are slightly more expensive. There is indeed a certain snob value in owning an English car, or overcoat, or in drinking Scotch. But Italian tastes are not the same as British. Although a few lines may sell by virtue or their "Britishness", others may be condemned as dull or old fashioned. Much Italian industrial design is excellent, and a buyer rarely makes a close technical study of two products before buying – he just chooses the better looking.

The moral for the British manufacturer is, of course, 'Come and See'. Discover how well the market for your goods is covered by existing suppliers, what makes their goods sell, and where the gaps are. There are many good agents to choose from. But, tell the Consulate-General at Milan or the Consulate at Turin what you are after: they are very willing to give you whatever help they can.

Lombardy and Piedmont are without doubt the richest and most sought after markets in Italy; competition is therefore intense. British exports have increased and are still increasing but our share of this booming market can be, and should be, improved still further.

Veneto

by H.M. Consulate, Venice

THE VENETO, or 'Venezia Euganea', is the north-eastern region of Italy comprising the Provinces of Venice, Padua, Verona, Vicenza, Treviso, Belluno and Rovigo.

The total area of the region is 18,388 square kms., of which 86·9 per cent is agricultural and forest land and 13·1 per cent urban or taken up by rivers and roads. Of the total area, 29·24 per cent is mountainous, 14·20 per cent hilly and 56·56 per cent plains. The population is approximately 3,900,000, making it one of the most densely populated areas of Italy, with 209 inhabitants per square kilometre.

The port of Venice, which serves the whole of the Veneto and carries a considerable volume of goods for Germany and Austria, is growing rapidly in importance. The port facilities are now inadequate to deal with the increasing volume of goods passing through. Plans are afoot, however, for enlarging the wharfage and cargo-handling equipment.

A total of 13,620 ships entered and cleared the port of Venice during 1963, compared with 12,971 in 1962, carrying 14,289,000 tons of cargo, or an increase of 13·1 per cent, while passenger figures were 235,571, or an increase of 9·7 per cent over 1962.

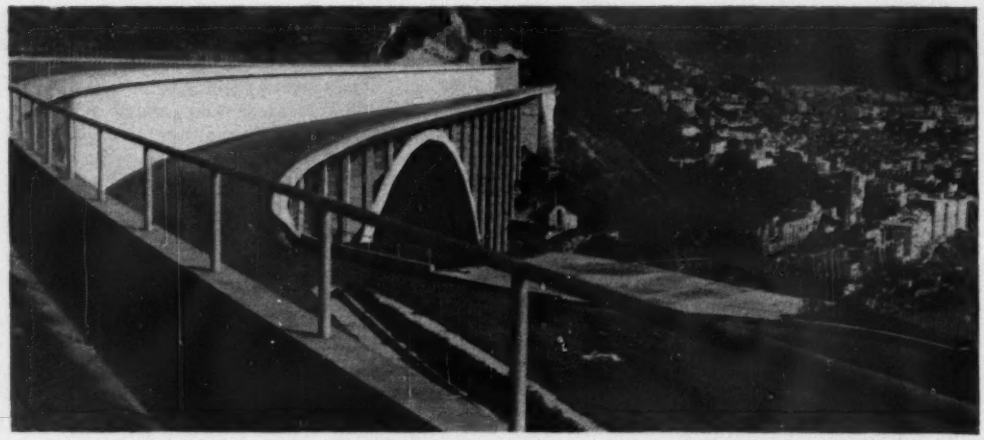
Industry

Industry in the Veneto covers a wide range of commodities ranging from heavy engineering to clothing manufacture. Mining is negligible except for marble and stone quarrying and the extraction of methane gas.

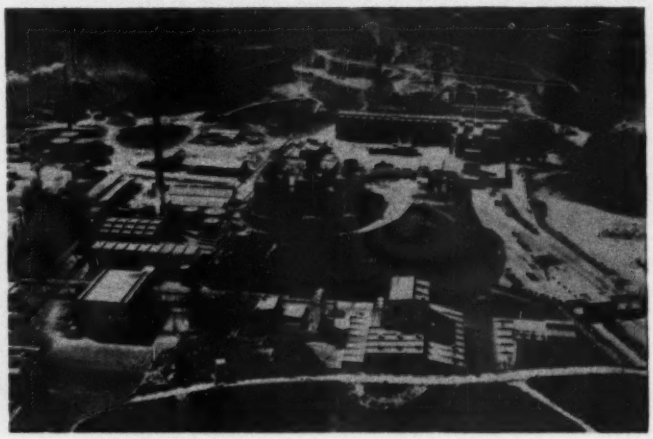
The most highly industrialized Province is that of Vicenza which produces textiles, paper, furniture and pottery, and also has heavy and light engineering works.

Marghera and Mestre, on the Venice mainland, rank second for the number of factories operating and workmen employed, but this

Right: Pompeii – Salerno *autostrade.*



Below: Examples of recent industrialization in Sicily. Left: pipeline of hydro electric plant at Catania; right: distillation plant for crude oil at Ragusa.



region is perhaps more important for the Veneto's economy in general. I.R.O.M., one of the largest oil refineries in Europe, is situated at Marghera where there are a number of factories engaged in heavy and light engineering, foundry work, the manufacture of chemicals, fertilizers, artificial fibres and plastics. Mention should be made of the factories at Murano, near Venice, producing the famous Venetian decorative glassware.

Verona's industries are similar to those of Marghera and Vicenza, while Treviso is renowned for its silk production, clothing and footwear factories and its large-scale furniture production. Both Verona and Vicenza Provinces are wine producing. The Glaxo Pharmaceutical Laboratories at Verona are an important feature of the Province's economy.

Padua Province is mainly devoted to agriculture, but there has always been some industry in and around the city of Padua and in outlying villages, engaged mainly in the production of artificial fibres, furniture, chemicals and also light engineering.

Padua ranks first in the Veneto for its wholesale trade which feeds the retail outlets of Venice, Verona, Vicenza and the other cities of the region.

Rovigo is predominantly an agricultural Province. Industry is little developed and its main contribution to the economy of the Veneto is its agriculture and the production of sugar and methane gas. Belluno Province is the timber centre of the region which also produces a considerable volume of electric power.

Agriculture

Agriculture is still a very important factor in the life of the region, with its good soil, temperate climate and correspondingly high unit yields. Mechanization was increased by 340 per cent in the period 1937-1957, and this process continues. The most highly mechanized Province is that of Verona, followed by Padua and Vicenza.

The principal economic resources of the region are timber from the Belluno and other mountainous regions; vines and fruit orchards, including mulberry trees for silk-cocoon production, from the hills and plateaux; meat, dairy produce, wheat, maize, fruit and vegetables from the plains.

Cattle breeding represents some 12 per cent of the total national production, and poultry 14 per cent. The Veneto produces some 600 million eggs annually. Silk-worm production represents 57 per cent of the total national figure.

Tourism

Tourism plays a very important role in the economy of the Veneto. The main centres visited by tourists are Venice, Lido-Venezia, Jesolo-Beach, and Cadore and Cortina in the Dolomites; various other smaller resorts are situated along the 'Venetian Riviera', Verona and Lake Garda.

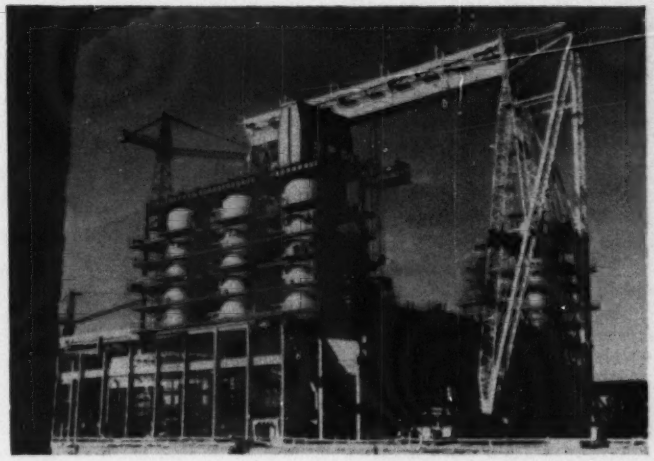
Communications

The Veneto is served by the international 'Marco Polo' Airport at Tessera, near Venice, and by a smaller one, at Treviso, once used by international airlines. 'Marco Polo' handled some 270,000 passengers in 1963, an increase of 25 per cent over the preceding year. During the same year the airport handled 597 tons of freight or an increase of 22·4 per cent over 1962.

The Veneto is well served by a network of good roads. The

Right: Innocenti/BMC IM3 model at the Neptune Temple at Paestum, south of Naples.

Below left: Reactor at Latina nuclear power station during an early stage of construction by the Nuclear Power Group, showing the Goliath crane and five of the six boilers.



autostrade from Milan to Venice, through Verona, Vicenza and Padua, is excellent and in addition to passenger traffic carries a considerable volume of goods and raw materials for industry. The railway network is good, with frequent and efficient services.

It is planned to build new *autostrade* from Venice to Trieste; Padua to Bologna; Venice to Munich, which will enhance the importance of Venice as a port for the transit of goods to and from southern Germany; Verona to Modena; and finally Verona to the Brenner Pass, the estimated cost of which is about 422,803 million Lire, or £242,990 million.

A waterway connecting the industrial areas of Marghera and Mestre with Padua is also in the planning stage.

Imports from Britain

British goods are popular in the Veneto. There is a preference amongst farmers, for instance, for British-made tractors and other agricultural machinery because of their renowned good quality. This applies to a number of other British-made commodities.

The northern Italian is, however, very price-conscious and unless goods can compete favourably with indigenous products and those imported from Common Market countries, they will not find an easy or a ready market. The demand for British woollen materials is still considerable, while the sale of British motor-cars is satisfactory in spite of strong competition from Italian and other car manufacturers.

There is also a market for consumer goods and confectionery, and British-made foodstuffs are to be seen in the better shops in the region.

It is important that goods hoping to obtain success in this market should be well packed and presented, and that they should, from the price angle, compare favourably with locally made products. Consumer goods should be in eye-catching packaging in order to stimulate sales from the shelves and counters of the growing number of supermarkets and department stores.

Among the British products handled by firms in the prinicpal towns of the Veneto are:

Motor vehicles	Agricultural tractors and machinery
Clothing	Garden tools
Earth-moving equipment	Woollen goods
Printing machinery	Suiting material
Marine engines	Woollen yarns
Whisky and spirits	Pleasure craft
Books	Pharmaceuticals

Agencies

Generally speaking, British firms wishing to enter this market tend to appoint agents in Milan, the principal industrial city in Northern Italy, for the sale of their goods in this region. These firms have sub-agents or distributors throughout the Veneto, Venezia Giulia and the other provinces of northern Italy who can successfully market their principals' goods.

However, should British firms prefer to appoint an agent in the Veneto itself, then the British Consulate in Venice would, on request, be happy to furnish a list of suitable firms. For example, an Italian firm in Padua acts as agent and distributor, for the whole of Italy, for a British firm of stationery manufacturers.

Central Italy

by H.M. Consulate, Florence

TO MOST BRITONS CENTRAL ITALY is Florence and Siena, Pisa and Perugia, and these in turn are the Renaissance, paintings, churches and a leaning tower. Commercially the region is supposed to be confined to the tourist trade and to the manufacture of Chianti wine and ornamental leather work. Up to some years ago such an impression would not have been inaccurate.

Industry stopped short with the Apennines. Tuscany, Umbria and the Marches were either agricultural or seafaring, and even today nearly half the population of 5,500,000 is still, if in ever decreasing numbers, at work on the land.

Agriculture was based on the age-old 'mezzadria', a crop-sharing system of mixed farming, so that every farm had to produce some of every form of crop, thereby crippling all possibilities of specialization in products suitable for the areas concerned.

This system, bad economically and politically, has been dealt its death blow by the present flight from the land to industry and by recent legislation forbidding new mezzadria contracts. Many hill farms have been abandoned, many others are being turned over to pasture for new enterprises in stockbreeding and dairy farming. Landowners, uncertain what to do, are forming co-operatives and even merging their holdings, so that they cannot be otherwise than receptive to experiment.

Some of their experiments have already proved successful. Many wheat fields of the old farmsteads in Tuscany and the Piceno have given way to a good sized fruit belt (much of it made into jam and put into tins manufactured by a British firm operating from Florence); there are similar areas of beet (Maremma and Marches) and vegetables (Empoli, Pisa and Piceno areas), while thanks to some new methods the tobacco crops at Perugia and Arezzo are still prospering. Pig breeding is also important.

Of the traditional industries the olive and the vine are still produced as before, but finding labour for both is a problem for the growers and, as priority in manpower will go to the vine, it is not unreasonable to speculate that the day is near when oil will be found from crops other than the olive.

In all these uncertainties there is one point of general agreement: the need for maximum mechanization. Machines must replace the missing men, and future production must be of a type for which machinery is adapted. There either is now, or will shortly be, a greatly increased demand for tractors for broken land and all that is newest in agricultural machinery, as well as refrigerating units for meat, fruit and vegetable producers, and a machine (if one exists) for harvesting tobacco leaves. At present between 2,000 and 3,000 agricultural machines are sold every year in Tuscany alone, so far chiefly tractors and harvester threshing machines, and 75 per cent are Italian. Payment is made over periods of 12 to 24 months.

Those leaving agriculture do not have far to go. The resilience of the Italians in reconstruction is nowhere more marked than in Central Italy, where enterprise and imagination have produced a pocket 'Industrial Revolution'. Old enterprises have expanded and small new ones continue to spring up, most especially in Tuscany itself. There, iron in Elba, mercury in the Amiata, lignite in the Arno valley and marble in the Apuane mountains, provide the minimum of mineral resources generally so lacking.

Some of the local industries are of fair size. Among them are Nuovo Pignone (oil drills, boilers, prefabs, etc.) employing over 3,000 people in their factories at Florence, Marina di Massa and Loreto; Officine Galileo of Florence (optical and precision instruments – some 2,000 workers); the Richard-Ginori china works of Sesto Florentino, Pisa and Leghorn with over 200 workers; Cucirini Cantoni Coats at Lucca (cotton yarn – 4,000 workers); in Perugia, Spagnoli (knitwear) and Perugina (chocolates) with a manpower of about 2,000 each. At Piombino are the foundries of Italsider and Magona d'Italia, and Terni has its steel works. But it is the small undertakings with their ubiquity and variety that reflect the real commercial picture.

Many enterprises concerned in particular products tend to concentrate together, as in Prato with some 800 firms (small and large) dealing with wool mills and processing, and Empoli with 250 for clothing and rainwear. Santa Croce sull'Arno has tanneries in large numbers, and shoe factories flourish in Florence, Pisa and Pesaro, as does furniture in the Pisa province and the Marches. Perugia has ceramics, Arezzo some fifty firms of gold workers, Siena metal furniture and pharmaceutical products.

Other examples not connected with any particular locality are equipment (such as cranes etc.) for building, household appliances, woodwork, felt hats, biscuits, and looms.

Of the two main ports, Ancona quadrupled its passenger traffic in ten years, and Leghorn, with its Stanic Oil Refinery, chemical concerns and naval base is doing well, bad road communications notwithstanding. On the seaboard too these small industries appear as boatyards and repair stations for pleasure and fishing craft. British marine motors enjoy a high reputation.

The overall picture is of an agriculture rapidly losing manpower and forced to seek a new economy, and of a few big and countless little factories, seldom totalling more than sixty hands.

Production and full employment have caused a steep rise in the standard of living. The new money is spent on more and better food (meat, butter, sweets), clothing, furniture and domestic labour-saving equipment, as well as on holiday travel and freehold purchase of the home. The taste for foreign goods is marked and these have already penetrated Central Italy at least as much as elsewhere.

The mass arrival of supermarkets has revolutionized buying habits to the delight of the consumer and horror of small business, which is learning the hard way the advantages of large wholesale buying, chain stores and co-operatives.

The openings for British exports are ample. Generally, the best approach is through a main agent in Milan or elsewhere in the North, who has a good network of subsidiaries, but when the type of goods requires details and numerous contacts with clients, a local agent is preferable.

The South

by the Cassa per il Mezzogiorno and the British Embassy, Rome

THE SOUTH OF ITALY, or the Mezzogiorno, is roughly the area lying south of a line drawn from Rome to Pescara plus the islands of Sicily and Sardinia. In area it is two-fifths of the whole country, most of it mountainous. With about 20 million people it has 38 per cent of the total population. For centuries subsisting in poverty off a backward agriculture, the people are now experiencing, first by emigration to the North and then on their own ground, the benefits which flow from an industrial revolution such as that which is sweeping Italy.

The fund for the south

The principal instrument established by the Government to administer the overall development of the South is the Fund for the South (Cassa per il Mezzogiorno). The long-term aim is to raise the under-developed areas of Southern Italy and of the islands to the level of progress already achieved by Central and Northern Italy. The foundation for this was land reform and public works – irrigation, communications, electric power. These were followed by

the creation of industrial estates and the introduction of fiscal and other incentives to investors.

The organization of the Fund called for maximum operational and financial independence, an efficient technical and administrative staff, a streamlined procedure and a detailed knowledge of the process of development. In the fourteen years of its life, the Fund has invested some £1,250 million – 53 per cent as infrastructure and 44 per cent as incentives to private undertakings. The work includes:

Infrastructures

Provision of normal water supplies for all the 2,638 Communes in Southern Italy. The plans provide for the estimated increased requirements during the next fifty years.

Improvement of 9,400 miles of existing roads; construction of 2,200 miles of new roads, some of them of considerable importance to the tourist trade; construction of a network of fast roads to provide a link with the *autostrada;* improvement and modernization of several railway lines with a high traffic density and establishment of a ferry-boat service between Sardinia and the mainland.

Agriculture

The schemes for the benefit of agriculture have been phased as follows: As an initial measure, a whole series of land reclamation and re-afforestation schemes, of schemes for the reclamation of mountain areas, for the improvement of water supplies, and for the electrification of rural areas, involving the construction of 4,400 miles of agricultural roads. As these schemes progress, a start is made with the transformation of the land by private enterprise, encouraged by the grant at a low rate of interest of subsidies and loans which are also aimed at creating industries for the transformation and preservation of the produce.

The greatest efforts for the progress of agriculture in Southern Italy are devoted to irrigation schemes. The estimated total area which it is planned to irrigate by 1965 is nearly two million acres – three times as much as in 1950 – of which a quarter will have been irrigated by private enterprise. When the programme is completed, the gross output is expected to increase by 60 million working days a year.

Industry

The first factories of importance were set up in 1953, following the establishment of special banks providing medium term loans for small and medium sized industries. Because these factories did not always accord with overall needs, and because demands for loans increased, investments had to be concentrated in areas more suitable for development. This principle subsequently evolved into the creation of industrial development areas and nuclei, where factory building was facilitated by the existence of basic services and the offer of favourable credit terms. Current legislation provides for free grants amounting to 25 per cent of the total expenditure, for loans bearing a low rate of interest which normally cover 50 per cent of the investments involved, and for contributions towards the payment of interest charges.

The funds required for industrial investments are completed by loans negotiated abroad with the European Reconstruction and Development Bank and the European Investment Bank, and by bonds issued on the American and Swiss markets.

The funds so far made available – including those deriving from foreign loans – have led to the financing of 3,100 operations, involving a total investment of 2·1 billion dollars, and have provided additional jobs for 160,000 workers. The grants amount to 37 million dollars, corresponding to 2,600 subsidized operations.

Other sectors

The other branches of activity encouraged by the Fund include handicrafts and the fishing industry, which are subsidized to the extent of 30 per cent and 40 per cent respectively; the provision of educational facilities, 4,257 new primary schools having been built in the smaller Communes with grants made available by the State; tourism (roads, sanitation and the improvement of places of outstanding historical, artistic and archaeological interest being a total charge upon the Fund); the hotel industry, for which subsidies of up to 80 per cent of the total expenditure are made available. Of far greater importance for the improvement of the general conditions in Southern Italy are the efforts of the Fund to raise the standard of professional training at all levels. This standard has improved considerably since 1950, following the establishment of 122 agricultural schools and of 32 industrial schools, the latter operating side by side with the training centres established jointly by the factories in the recently industrialized areas.

The effects of the all-out effort being made in Southern Italy are reflected in the increased annual income, which rose from £1,100 million in 1951 to £2,615 million in 1962, while the annual income per head rose from £64 to £141 during the same period.

Opportunities for British exports

In considering the Italian market the South can no longer be ignored. The need for increased agricultural production to satisfy domestic demand, combined with the drift from the land, calls for mechanization in the South as elsewhere. Small cultivators, crop sprayers, pumps, tractors, are promising outlets. Machine tools, air conditioning plant, measuring and control instruments, fork lift trucks, canteen equipment, office furniture, cleaning and polishing machines, building 'systems', flooring, are obvious possibilities.

The consumer market is perhaps the most promising of all. The former cowherd who now drives to the factory in his own car and draws a monthly pay packet of £40, or the prosperous horticultural farmer, and their families are concerned to raise their standard of living. Clothing, food, household equipment, private transport and housing, in that order, are the first outlets for the new spending power. But let it not be thought that here are simple people who can be fobbed off with whatever a manufacturer imagines is good enough. Quality, novelty and good design are even more important than price. Though there is little direct buying from abroad, it is for consideration whether, as at present, the business can best be done through an agent in the North: it may well be preferable to appoint a representative in, for example, Bari or Naples.

The advantages of investment in the South should also not be overlooked, especially if the Mediterranean area generally is of interest as a market.

Sicily

by H.M. Consulate, Palermo

ALTHOUGH THE Italian 'miracle' over the past decade and the resultant prosperity, particularly in northern Italy, is widely known, Sicily for many British exporters and for the public in general remains vaguely a pleasant sunny island of oranges, lemons and bandits.

Whilst the rate of progress in Sicily has understandably lagged behind that of the mainland nevertheless the advances in the past few years have been considerable and the economy which only a few years ago was almost entirely agricultural is now becoming increasingly industrial.

Sicily is a large island with an area of 9,935 square miles, considerably larger than Wales, with a population of over 5,000,000 whose rising prosperity provides an increasing market for all types of consumer goods. The traditional products of Sicily, citrus fruits, vegetables, grains, wines, cotton, fish, have lost much of their labour forces to industry with the result that considerable interest is being shown in modernization and mechanization. There is a growing market for small economical powered hand tools, small

tractors and other kinds of agricultural machinery and equipment. There is increasing interest too in the use of fertilizers and pesticides. Cold storage facilities on the island are meagre and fruit juice canning has not been developed but a number of firms are planning to enter this field and will require to purchase canning machinery and equipment.

The real transformation in the Sicilian economy, however, derives from the development of the industrial and commercial areas of Messina, Catania, Syracuse and Ragusa on the eastern side of the island. It is in this area that in recent years considerable deposits of petroleum, natural gas and potassium have been discovered and exploited. The oil field, whilst small by Middle East standards, is the largest in Italy and one of the largest in Western Europe. Sicily's excellent geographical location with regard to major oil-producing areas and the Italian mainland had, before the discovery of oil in Sicily in 1954, given rise to the development of oil refineries at the eastern ports. These discoveries have given added impetus to the petroleum and petro-chemical industries, and United States firms as well as the Italian Government have increasing investments in the area. The Italian ENI is at Gela and Gulf Italia at Ragusa. Standard Oil is completing a lubricants factory at Augusta which will be the largest of its kind in Western Europe. The monetary value of Sicily's combined imports and exports of petroleum and petroleum products has now overtaken citrus fruit exports as the major item on the balance sheet. The reserves of natural gas are much larger than those of petroleum and fresh discoveries continue to be made. It is predicted that the potassium extracting and processing industry (chemical fertilizers, etc.) will enjoy the highest rate of growth and, with continued development, the future of this industry seems assured. There should be a market here for the supply of capital machinery and equipment.

Assistance to investors

The regional government encourages economic development by providing incentives in the shape of government participation in capitalization of new firms, low-interest loans, exemption from import duty on machinery for approved projects, and tax concessions. Any firm desirous of entering Sicily with the financial backing of the regional government must affiliate itself with SOFIS, the regional government agency which participates in the capitalization and often in the management of new firms. This agency as well as assisting Italian investors willingly co-operates with and assists foreign investors. To date its biggest achievement has been the partnership it recently formed with FIAT for the assembly and later the manufacture of FIAT cars in Palermo. The new firm, SICIL-FIAT, plans to produce 30,000 vehicles a year. There is also a regional government agency IRFIS which provides similar services for new industrial ventures.

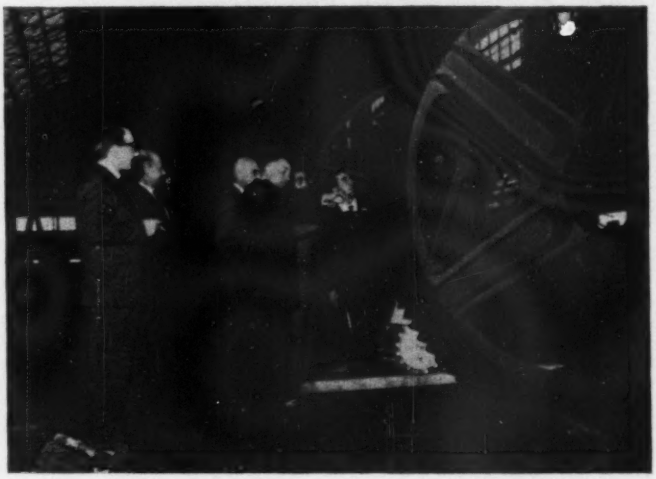
Another result of this increased industrial and commercial activity has been a sharp increase in the volume of cargo handled at ports. Augusta is now only surpassed by Genoa in the amount of cargo handled at Italian ports. In addition, Milazzo and Porto Empedocle are being newly developed to meet the demands of freshly established industry.

A further spur will be given to the economy, especially tourism, when the *autostrada* on the mainland which at present reaches only as far as Naples has been extended to Reggio di Calabria on the Messina Straits and when various proposed road projects in Sicily have been carried out.

Inevitably Sicily is daily becoming more urban as blocks of apartments, offices and shops arise adjacent to new industry. Towns like Palermo, Messina, Catania, Syracuse, Ragusa, Agrigento and Taormina, the last-named a popular holiday resort, resound to the noise of building, and their skylines are rapidly being transformed by the many new blocks going up. The ubiquitous supermarket has made its entry and is already transforming Sicilian shopping habits. The supermarket should provide an expanding and easier market than formerly for a wide range of British products such as tinned food, jams, confectionery, biscuits, sauces, spirits, soaps, toilet articles and small household goods.

The agents in Catania, Palermo and Messina do not import direct on any scale and on the whole they act as sub-agents, though there is potentially more scope for direct imports. They visit the main agents in the north periodically and place orders. Some northern Italian agents visit the island with samples but there have been no known visits by commercial representatives from Britain. Nevertheless, there is some direct importing – notably by commission agents in textiles and machinery and by the supermarkets. The value of goods cleared through Sicilian customs points rose from 69,442 million lire in 1959 to 157,004 million lire in 1962. As the economic importance of Sicily grows it will become increasingly important for British firms to have direct representation.

To conclude, there is a growing market in Sicily for British goods comparable but on a smaller scale to that of mainland Italy and it is up to the British exporter to go after his share of that market.



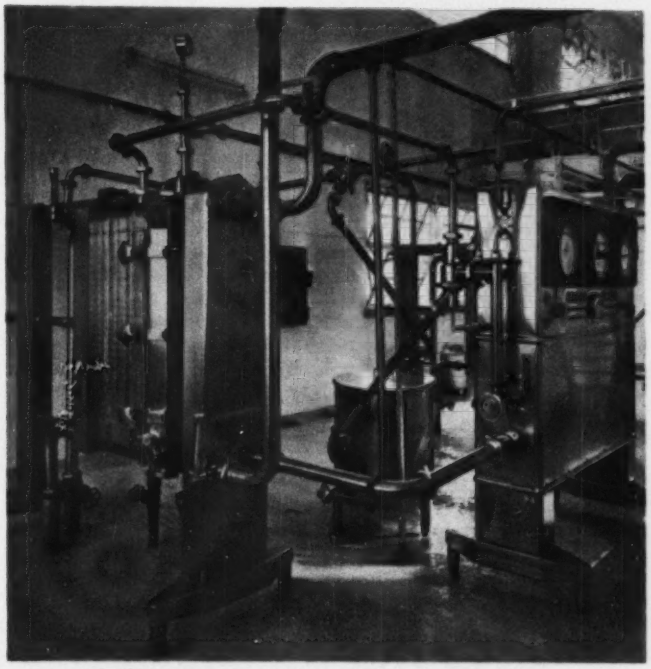
Top: A 30-ton capacity 'Portasilo' for cement, packed in a polythene bag on a special rail waggon, *en route* from Portasilo Ltd., York to Milan.

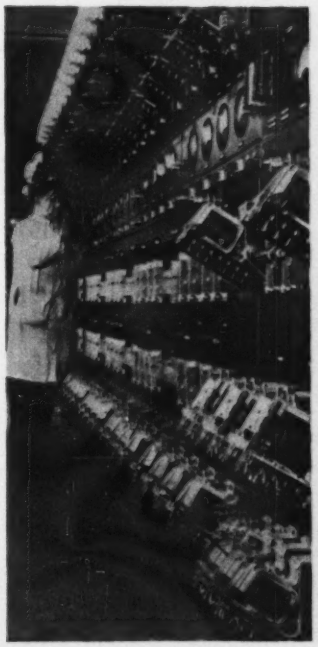
Lower: Members of a party of 17 Italian steel manufacturing executives visiting Darlaston works of the Wellman Smith Owen Engineering Corporation Ltd.

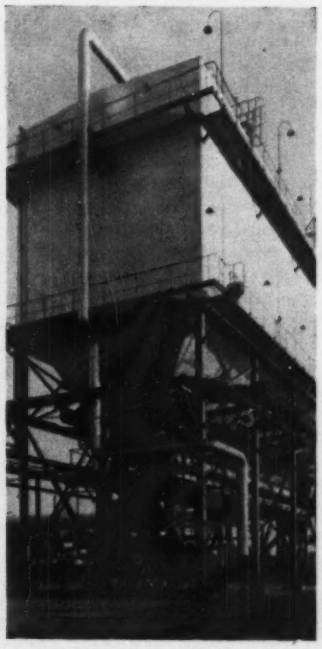
Achievements of British industry

Top: Stainless steel milk evaporator made by The APV Co. Ltd., Crawley, and installed at milk processing plant in Frosinone.
Below (left): Open type control panels ordered by Cosider of Genoa under manufacture at the Rugby works of Associated Electrical Industries Ltd. The control panels and other electrical and electronic equipment are for installation at Cosider's continuous weld tube mills at Piombino.

Below (right): High temperature fabric filter dust collector at the Phillips Carbon Black Italiano S.p.A. plant at Ravenna. It was designed and constructed in England by Tilghman's Ltd., Altrincham, and constructed by an Italian company under supervision by specialist engineers from Tilghman's.







Camco Ltd, Belfast, manufacture and sell, among their specific types of oilwell production equipment, Wireline Tools used for controlling, testing wells, and so on. These unique devices are placed in or retrieved from a well using a .082in. diameter wire line. It requires expert operators of the wireline reel unit, however, to manipulate the tools into and out of the well. Camco's parent company in the United States therefore trained two employees of AGIP, the Italian oil company, in this specialized technique for a year at Camco's expense. As a consequence AGIP has the necessary expert wireline operators to make the purchase of Camco Wireline Tools from Belfast a practical matter for AGIP and a profitable matter for Camco.

W. A. Baxter & Sons Ltd., of Fochabers, for many years have supplied their Scottish foods to Italy and have regularly shipped direct to Supermarkets Italiani and other stores. However, distribution over the whole country was not proceeding as required, due to indifferent agency coverage, and it was decided to make a change in representation.

A short list of potential agents was selected with the assistance of Export Services Branch of the Board of Trade, and in May 1963 the Sales Director and the Trade Development Manager visited Milan, Bologna, Florence and Rome. As a result of interviews they appointed as agents for the whole country Fratelli Rinaldi of Bologna, who in six months have placed orders for 6,000 cases of Baxter's Fine Foods. Sales are now increasing rapidly.

The Managing Director of **H. Morris & Co. Ltd.,** Glasgow, visited leading industrialists in Milan when he was there in May 1963 with the Glasgow Chamber of Commerce Trade Mission to Italy.

In the course of his tour Mr. Morris visited the large departmental store of La Rinascente and was able to secure an order covering almost the entire range of contemporary dining-room suites, bookcases and desks.

Although prices of domestically produced furniture in Italy tend to be lower than those at which imported furniture can be sold in Milan, the company is confident that the 'Morris of Glasgow' design and finish will ensure a regular flow of repeat orders.

Blenkhorn Richardson & Co. Ltd., of Hawick, have or many years been exporting high-class Cheviot suitings to the Italian market. The multiple tailor is practically non-existent in Italy, and the country could be described as the last stronghold of the bespoke tailor who places great importance upon quality and high fashion. In recent years Italy has been credited with up-to-date styling of motor-cars and men's clothing, and it is a matter for great satisfaction that they have chosen Scottish Cheviots as the medium for expressing their sartorial excellence.

Moxey Ltd. (Winget Gloucester Group) have received a £1 million contract for an iron ore and coal preparation plant from Italsider, the Italian iron and steel organization. The plant, to be installed at the Bagnoli Steelworks near Naples, will handle incoming iron ore, crushing 20in. cube lumps down to 2in. pieces, and stocking-out at over 3,000 metric tons per hour. The coal plant will have a stocking-out capacity of 2,500 metric tons per hour.

A synchronized sequence of conveyors, using eight and a half miles of rubber belting, will link the unloading, crushing, screening, stocking and reclaiming systems.

This contract was won against fierce international competition.

Bevan Funnell Ltd., Newhaven, exported period furniture to Italy worth £59,808 in the year ended October 1963. This year exports are running at a rate of £80,000 a year. It is only three years ago that the company, which today has total exports of over £¼ million a year (57 per cent of production), began selling in Italy. It now has its own storeroom in Milan and attributes much of its success to its energetic agent. The company operates four delivery vans on the Continent, and one of these takes supplies from Newhaven weekly to Milan via Antwerp, Germany, Austria and the Brenner Pass. The Managing Director, Mr. Barry Bevan Funnell, has converted his large seagoing yacht into a floating exhibition of the company's furniture. This summer he is using it to visit Mediterranean and Scandinavian markets.

S. A. Monk (Sutton-in-Ashfield) Ltd., report that during the last five years demand from Italy for their full fashioned knitting machines has almost outstripped supply. The machines have been successfully installed in places as wide apart as Venice in the North and Sicily in the South – an indication of Italy's desire to industrialize the less-developed South and a pointer to where opportunity may lie. The company notes that each year its agent sells machines in fresh areas outside the traditional textile-producing regions of Italy. Special efforts are made to satisfy the individual requirements of the Italian customer. This is combined with an efficient sales and servicing organization in Italy.

William Mills (Sunderland) Ltd., Birmingham 19, makers of release gear for ships' lifeboats, have been very successful in Italy. Beginning eight years ago from a few small orders, their exports to that market have now progressed to the point where a considerable percentage of ships built in Italy, including most large passenger vessels, have the company's equipment fitted in their lifeboats.

Charles Tanneries Ltd., Nottingham, sole distributors for the products of their parent company, Wade & Co. (Nottingham) Ltd., have enjoyed a steadily increasing business in Italy over the last two years in shoe leathers. Being leaders in the fashion world, the Italians are of necessity very discerning buyers and although imports are subject to duty and taxes of around 25 per cent, this company has achieved sales amounting to several hundred thousand square feet.

From their efforts to include Italy in their widening field of exports, the company finds that there are four basic rules for export success in Italy, namely (1) a first-class agent who has a full understanding of the market and can interpret the changes required of a commodity so subject to fluctuations of fashion as leather, (2) regular personal visits from England to keep close contact with buyers and assess the full potentiality of the different areas within Italy, (3) a top quality product, carefully and well manufactured, and (4) fast delivery when orders have been placed. Charles Tanneries maintain that a considerable contribution to their success as exporters is due to the assistance and advice which has been given by officials of the Board of Trade.

Davidson & Co., of Belfast, makers of the Sirocco range of fans and ancillary equipment, have recently supplied six large sinter pelletizing fans for special duty at Società Montecatini's new steelworks in Milan. The fans, designed and built by Davidson, are the most modern of their kind in Europe, and will play an important role in the new sintering process adopted by the Italian company. Constructed of special heat resisting steel, they will be used to circulate gases at temperatures up to 900 degrees F.

The fans are of the double inlet star blade type and the largest, with a 95″ diameter runner, is powered by a 500 h.p. motor and is designed to handle 100,000 cubic feet of gas per minute at 1000 r.p.m. In addition to the six pelletizing fans, Davidson have also supplied four smaller cooling fans for the Milan works.

Byron S. Bellamy Ltd., an enterprising Scottish exporter of fish, investigated the demand of the Italian market for fish and found over the last ten years that growth was encouraging, due to the higher standard of living of the Italian people.

One species in particular, squid or calamari, a crustacean previously caught in the Mediterranean and along the African, Spanish and French coastlines, had in the past been thrown overboard by Scottish fishermen as being useless except for bait, but the export trade created by Byron S. Bellamy had grown by 1962 to well over 1,000 tons of Scottish squid. Other fish exported from Scotland to Italy are the monk or angler fish and the porbeagle shark. Once considered of little value, the export demand in both France and Italy for these species has raised the price to a level considered impossible a few years ago.

The managing director of **Thos. Borthwick (Glasgow) Ltd.,** Mr. J. N. M. Scott, visited Italy during May, 1963 as a member of the Glasgow Chamber of Commerce Trade Mission to Milan. He took the opportunity of extolling the merits of the animal feed 'Scotasol' produced by the Distillers Company Limited as a by-product in the production of Scotch malt whisky. Another animal feed, 'Scotaferm', a by-product of Scotch grain whisky, has since begun manufacture. Thos. Borthwick (Glasgow) Ltd. are the sole distributors of these animal feed by-products, which contain valuable levels of protein, the vitamin B complex, are rich in the fermentation factors so essential for rapid growth and optimum food conversion and can be used economically as alternatives to dried yeast, dried whey or other similar products. 'Scotasol' and 'Scotaferm' are now widely and successfully used in the diet of broilers, young animals and laying hens.

Turner & Newall Ltd., Ferodo Ltd.'s parent company, recently announced the formation of a new company, Ferodo Italiana SpA, to manufacture friction materials at Mondovi in Northern Italy.

Earlier this year, too, Commendatore Enzo Ferrari awarded Ferodo Ltd. his Prancing Horse Trophy in recognition of their technical contribution to his organization.

The Churchill Machine Tool Co. Ltd., since their foundation in 1906, have exported to Italy more than 200 machines of many types, covering almost every aspect of precision grinding. Many leading car manufacturers use this firm's machines which are also used in the electrical and bearing industries. The firm has frequently exhibited at the Milan Fair and last year at the Milan Machine Tool Fair.

They maintain contact in Italy through the Milan office of their London agents and also employ directly a permanent European salesman.

The Italian sugar industry, realizing the growing importance of supermarket trading, recently began to think seriously of prepacking sugar into 1 kilo cartons. An Italian firm of packaging machine manufacturers, realising in turn the importance of accurate filling of the 1 kilo cartons, approached the Birmingham firm of **Southall & Smith Ltd.,** specialists in the manufacture of automatic weighing and filling machines for the packaging industry.

Southall & Smith sent out to Italy a small batch of weighers, each machine capable of weighing 1,200 one kilo cartons of sugar per hour to a high degree of accuracy. These were so successful that repeat orders began to flow in immediately and now over 70 machines for the weighing of sugar alone, and many machines for weighing other products such as coffee and flour, have been exported to Italy. In addition the original Italian firm are in turn exporting their packaging machines to other countries with Birmingham-made automatic weighers.

C. A. Norgren Ltd. have for many years exported their entire range of compressed air equipment for sale in Italy through their agents. The volume of sales have steadily increased, particularly in recent years. Equipment shipped includes compressed air filters, pressure regulators, filter-regulators, air line lubricators, relief valves and other equipment for general and specialized air line applications in a very wide range of pipe sizes. Further, the Norgren Micro-Fog Lubrication System is becoming increasingly used on all types of plant and machinery.

Norgren agents in Italy are A.R.M., S.r.L., who have moved their head office from Trieste to Milan in order to offer a better service to customers in the industrial north.

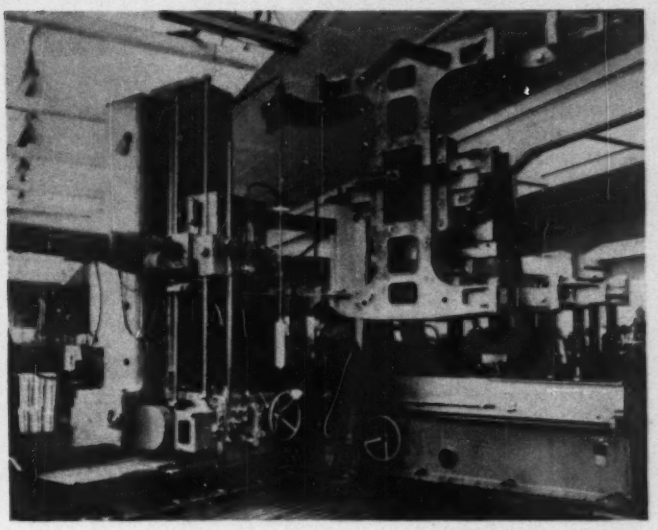
Industrial Service Outlets Ltd. of Horsham secured a £50,000 contract from Alitalia for the installation of their service outlets for the new hangars at Fiumicino Airport, Rome.

These units are claimed to give the maintenance engineer a safe, dependable and speedy connection for electricity, water, compressed or chilled air, without impeding the movement of aircraft or other wheeled traffic.

Hancock & Co. (Engineers) Ltd., Croydon, Surrey, received an order in September, 1963, for three large oxygen cutting machines,

Left: An English Electric Co. Ltd. stator for the electricity transmission scheme between Sardinia and the Italian mainland.

Right: H. W. Kearns & Co. Ltd.'s horizontal surfacing, boring and milling planer at S.I.A.I. Marchetti S.p.A., Italy, machining a bogie frame for the Italian State Railways.



worth about £10,000, for Italy. The machines are to be installed in two factories, one in Bergamo and one in Leghorn, being built for Costruzioni Metalliche Finsider of Milan, manufacturers of steel fabrication. The order was placed with the Croydon company following a global call for tenders. The equipment is of a specialized nature and is being built to customer's requirements: Hancock's claim to be the only company in the world specializing in the manufacture of oxygen cutting equipment.

The Worcester Valve Co. Ltd. of Burgess Hill, Sussex, ball valve manufacturers, report that exports of ball valves to Italy three years ago were approximately £5,000 annually and that they are now running at an annual rate of £15,000, although Italy is not one of their best markets. The volume of their business is attributed to various factors such as a good agent, prices, and quality.

J. C. Bamford (Excavators) Ltd. came into the Italian market in the mid-fifties. Some three hundred Bamford excavators are now being used, thanks to the vigorous sales drive of Messrs. I.C.O.M. of Naples, on numerous public works contracts throughout Italy. These include roads, irrigation schemes, pipe-lines, industrial complexes, etc. Best-known to the general public amongst the enterprizes on which Bamford's machinery has been employed are the piercing of the road tunnel under Mont Blanc and the building of the Autostrada del Sole (the Motorway of the Sun).

Mr. F. Andrew, of Messrs. Imper, Naples, has sold some £2,000 worth of biscuits made by **Wm. Macdonald & Son,** Glasgow. He started from scratch about nine months ago. The sales technique is to sell direct to coffee-bars, grocers and, only lately, to supermarkets. At present new clients are being obtained at the rate of seven or eight per day.

The local firm is being well backed by Messrs. Wm. Macdonald with display material, including film publicity.

Morganite Resistors Ltd., of Jarrow, commenced their selling campaign in Italy in 1952, and in that year sales amounted to about £100.

Agents were then appointed and by 1963 sales had risen to over £100,000 representing some 50 million carbon resistors principally used in the manufacture of radio and television sets.

This substantial increase in sales has been achieved against indigenous manufacture and intense competition from other European suppliers.

During 1963 Morganite Resistors designed and put into production an entirely new miniature resistor to meet with the particular requirement of an Italian manufacturer in the industrial field and within a few months sales have already exceeded three million pieces.

Sanders Bros. (Small Tools) Ltd. report that exports of their automatic two-speed machine vices have been held, for at least nine years, at 68 per cent of total units sold. In 1963 Italy was by far their best overseas customer, taking no less than 25 per cent of their total output, and raised their export ratio to a record 89·7 per cent. This satisfactory figure was achieved because the company's Italian distributor had realized that a boom in the industrial parts of Northern Italy was apparent and advised Sanders that if they could slightly reduce costs and increase supplies, advantage could be taken of it. Over the last three years their sales to Italy have risen by 250 per cent.

Lloyd Menswear, of London and Northern Ireland, perform the coals-to-Newcastle feat of selling to Italians dressing-gowns made from Italian cloth. Most of the gowns Lloyd Menswear export to Italy, however, are made from British cloths. Tartans are popular. So are beach-robes of terry-towelling. The firm's dressing-gown exports to Italy have shown an annual increase of 10 per cent in value during the present decade. That orders are not won easily is shown by yearly fluctuations of from 15 per cent downwards to 40 per cent upwards – due largely to variations in the enthusiasm of Italian buyers for new styles. Secret of Lloyd Menswear's success in this difficult market is their know-how about local conditions. especially climatic. Lloyd Menswear sell few heavy-weight dressing-gowns in Italy, but otherwise they sell their whole range of full-length gowns, beach wraps and host coats.

For many years **William Warne & Co. Ltd.,** of Barking, Essex, have exported their rubber products to the Italian market. In recent years exports to this market have increased to the extent that Italy now ranks among the major export markets of this company. Among the many products exported to Italy, the most notable sales increases have been in Warne surgical products, wire braided hydraulic hose and rubber thread for the garment industry. The Warne oil spillage boom has been tried and accepted by the Italian Port Authorities. During the 1962/63 period, exports to Italy increased by approximately 300 per cent over the previous period and sales of all products continue to expand. To keep pace with the expanding demand from world markets, William Warne & Co. Ltd. have recently opened an additional factory at Lurgan, N. Ireland.

From a first contact through the Board of Trade to a subsidiary company manufacturing, packing and distributing nationally in Italy has taken **Dylon International Limited** only four years. Dylon

manufacture and sell at home and overseas a comprehensive range of household dyes and cleaners; their particular success in Italy is attributed first to the right choice of agents – now associated with them in their Italian company – and secondly to a flexible export policy whereby new products are introduced, and standard products completely re-designed, to suit the needs of the market. One product, for example, the carpet cleaner, after only limited success in its standard pack was completely re-designed specifically for the Italian market and is now selling strongly there with national TV and Press advertising in its new presentation. Having a thriving subsidiary in Italy is proving of great benefit to the company in that exports of some Dylon products from Italy are being made direct to other EEC countries.

Forged steel rolls for the hot and cold rolling of all ferrous and non-ferrous metals and alloys are one of the most highly complex metallurgical components used in the modern high-speed continuous mills operating at speeds up to 5,000 feet per minute. **Firth Brown** work rolls, and both solid and composite back-up rolls, which may weigh up to 80 tons each, are exported to over 40 countries, and despite their size and weight they are a precision engineering product calling for extreme care in packaging, handling and storage.

All rolls for shipment overseas are treated with a rust-preventing chemical, coated with plastic and wrapped in hessian and crated. All crates are clearly labelled with handling and storage instructions in six different languages, which has proved to be a great help in ensuring the correct handling of these valuable items of rolling mill equipment, which are used extensively in Italian steel mills.

Messrs. **Regulateurs Europa Ltd.,** the Colchester diesel engine control specialists have, in conjunction with their Milan agents, Messrs. C.T. (Milano), secured a large and valuable order from Messrs. Alfa Romeo for the supply of electric load sensing governors.

These governors will be fitted to diesel generating sets manufactured by Alfa Romeo and will enable these sets to maintain exceptionally close control of generating frequency for a specialist application.

Ransomes & Rapier Ltd., Ipswich, one of the Newton Chambers group of engineering companies, are now erecting in Southern Italy one of their largest walking dragline excavators, for which they obtained the order in 1961. This machine, known as the Rapier W.1800, will be used by the Italian Electricity Authority, Ente Nazionale per l'Energia Elettrica (ENEL), in the Mercure Lignite Basin to uncover the lignite which will provide fuel for a new thermal power station being built nearby.

The W.1800, similar to several working on coal and ironstone stripping operations in Great Britain, weighs 1,800 tons and carries a 43 cubic yard dragline bucket on a boom 260 feet in length. It is electrically operated and all its movements are controlled by one driver.

Although Italy is comparatively a small market for **John Bedford & Sons,** Sheffield, manufacturers of engineering files and rasps, spanners, hammers, chisels and other hand tools, nail files and tweezers, sales are progressing at a faster rate than in other markets. From unpretentious beginnings six years ago sales have doubled since 1961, due to frequent visits to Italy and personal contacts with prospective buyers made by the firm's sales director.

F. Perkins Ltd., who claim to be the world's largest diesel engine manufacturer, have a wholly-owned sales and service company, Motori Perkins S.p.A., based at Lake Como in Italy.

Established in 1961, the company now have 50 agents throughout the country offering sales and service for the complete range of Perkins' vehicle, agricultural, industrial and marine engines ranging from 18 to 135 h.p. Perkins' engines are used by major Italian manufacturers of combine harvesters, tractors, compressors, fork-lift trucks, excavators and loaders.

A well known tractor manufacturer, Landini, is making Perkins' engines under licence at Fabrico.

Sheppard, the Bridgend engineers, whose metal casting machines are in use in every continent, have a growing business in Italy.

Recently they supplied a mobile aluminium casting machine to Messrs. S.A.V.A., of Fusina, near Venice. The machine for this smelting works was accompanied by an automatic stacker to deal with 20 kg. ingots at casting rates of up to ten tons an hour continuously.

To further Italian sales, Sheppard have recently concluded an exclusive licensing agreement with Bernotti, of Milan, furnace manufacturers, for the manufacture of the entire series of Sheppard Ingotmaster and Ingoteer casting machines. An example of this co-operation is at present in the final stages of construction for another Italian customer, Messrs. Magneti Marelli, of Milan, for whom Bernotti have built a lead pig-casting machine, and Sheppard have supplied associated automatic stacking equipment, to be delivered to the customer and erected under the guidance of a Sheppard engineer.

Redman Tools Ltd., of Worcester have raised the export figure for their machine tools to 80 per cent of their output and have recently broken into the Italian market against strong local competition. Redman have also sold to Italy two automatic transfer machines for the production of laminations for large power transformers from coiled strip material.

'Instant service' – anywhere in the world – is the company's sales policy. By leaving his home in Worcester shortly after 5 a.m., Mr. C. Phillips of the company, can drive to London Airport, fly to Milan and be back before midnight. In 20 hours from his departure the night shift at the factory can be at work on the solution to a problem which he has personally inspected on the floor of an Italian factory. Mr. Phillips finds that the essentials in export sales of capital goods are: robust design to ensure trouble-free performance, and auxiliary components which can be replaced or serviced on a world-wide basis.

Boulton and Paul Limited, structural engineers of Norwich, have received three recent orders for installations of their semi-automatic structural steel fabricating plants in Italy.

The complete installations are controlled by only four operators, and serve to cut accurately to length and drill all holes in steel joists weighing up to five tons or more without cranage or marking-off.

R. Hoe & Crabtree Ltd., London, manufacturers of printing machines of all types, ancillary equipment and folding machines, have experienced their best year ever in respect of exports to Italy of their metal decorating lithographic offset presses, having received and executed orders worth in excess of £100,000.

Their machines are designed for printing on metal used in the production of containers for cigarettes, biscuits, vegetables, fruit, fish, etc. and also of crown corks, table mats, etc. The presses are sold to firms actually engaged on printing metals for the trade and also to metal box manufacturers.

Hoe and Crabtree's business throughout Italy is transacted through the agency of Angelo Agniti of Milan and Genoa.

T. D. Bailey (Export) Ltd., London, sole export agents for Burns' electric guitars and amplifiers, report that, following upon the appointment of Farfisa S.p.A., well established Italian distributors and also manufacturers of musical instruments (non-conflicting), they are beginning to establish the Burns' guitars and amplifiers in Italy and are confident that by the end of 1964 a real foothold will have been established.

SETTING UP A BUSINESS IN ITALY

Attention may be drawn to the following booklets, containing useful information on this subject, published in English by Italian banks and available from them free of charge on request:

Guide for Foreign Investors in Italy, *published in* 1963 *and available from the Italian Economic Corporation* (*Banca Nazionale del Lavoro*), *Barrington House*, 59/67 *Gresham Street, London, E.C.*2. (*Tel. Monarch* 3156-7).

Vade Mecum for Foreign Investors in Italy, *from Banca Commerciale Italiana*, 21 *Birchin Lane, London, E.C.*3. (*Tel. Mansion House* 0148).

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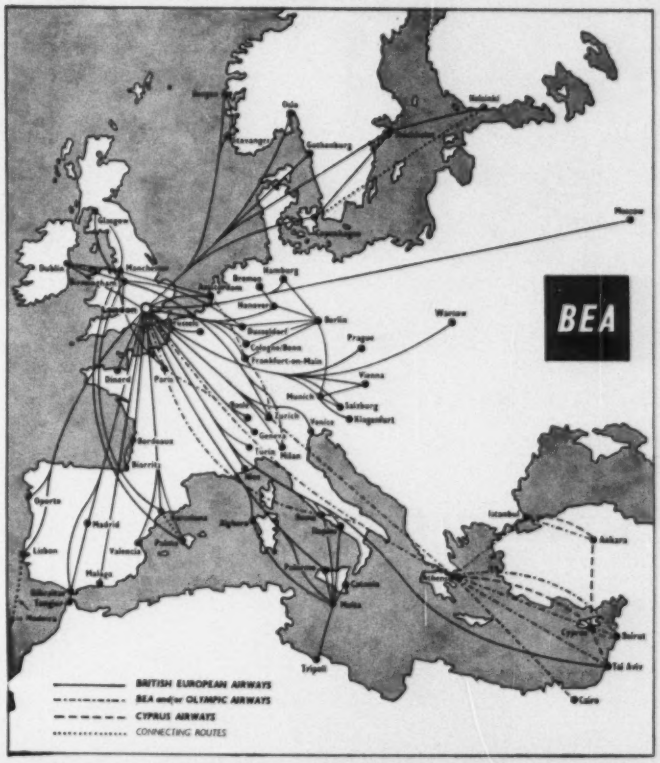

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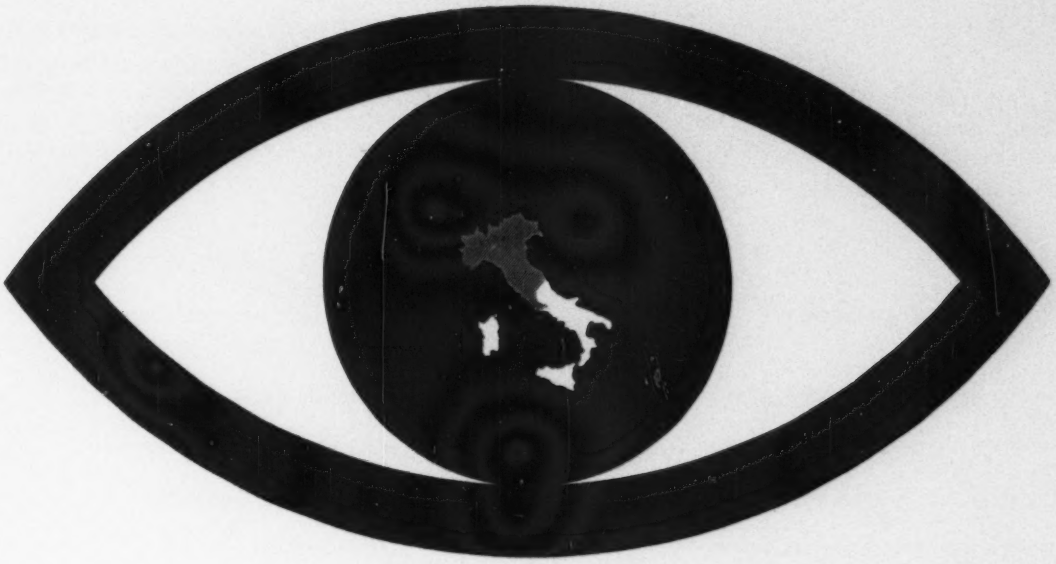

AT SOUTHERN ITALY

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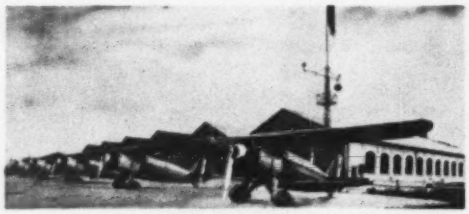

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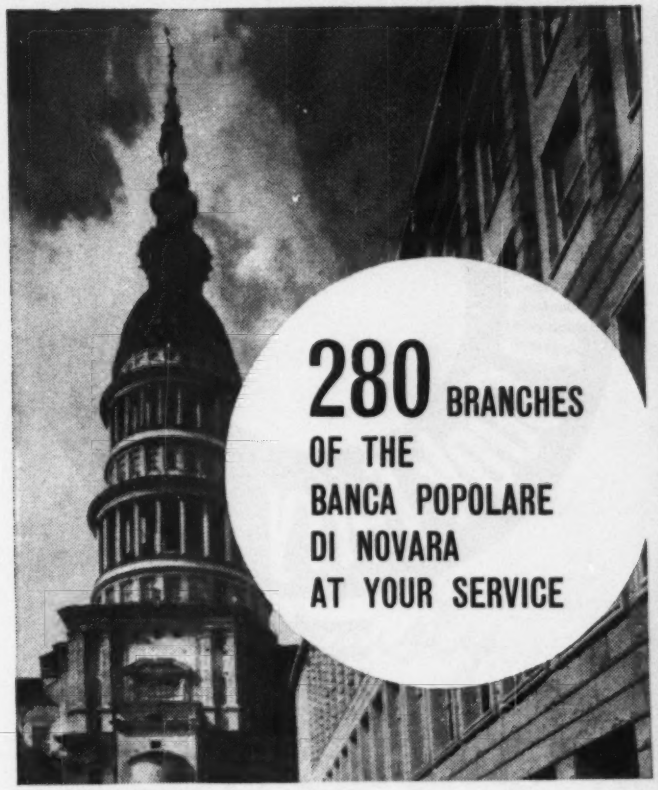

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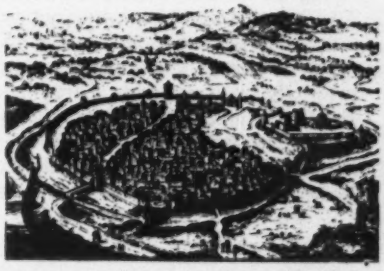

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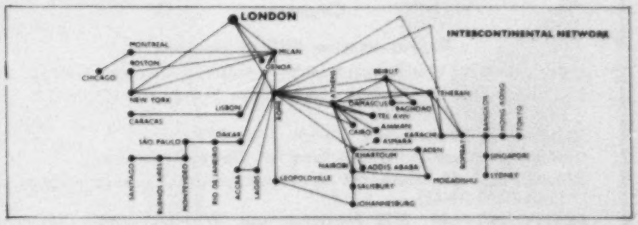

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TRADE AND FINANCIAL ARRANGEMENTS

United Kingdom and USSR

IN ACCORDANCE WITH Articles 2(2) and 4 of the Anglo-Soviet Trade Agreement of 1959, which was extended in April this year for a further five years ending June 30, 1969, the Board of Trade, and the permanent Soviet Trade Delegation in the United Kingdom have recently conducted negotiations to agree quotas for trade in consumer and certain capital goods and industrial materials for the period from July 1, 1964 to December 31, 1965.

The quotas for Soviet consumer goods to be imported into the United Kingdom amount to £5,465,000 c.i.f. The quotas for British consumer gods to be imported into the USSR amount to £4,970,000 f.o.b. In total the new quotas allow for an increase of nearly £1¼ million (in c.i.f. terms) in the exchange of consumer goods over the next eighteen months. One-third of these quotas will be available for use in the last six months of 1964, and two-thirds during 1965.

The total value of quotas for the export of British instruments and certain industrial materials has been increased by £200,000 to £3,200,000 f.o.b. The Soviet authorities will issue licences for up to £1,200,000 for scientific and other instruments, £1,200,000 for chemicals and £800,000 for man-made fibres and yarns. The corresponding total for Soviet goods is £4,325,000 c.i.f. including £225,000 for scientific and other industrial instruments. As in the case of consumer goods, one-third of these amounts will be available in the last half of 1964 and two-thirds during 1965.

Full details of the quotas are given below.

Notes:

The Anglo-Soviet Trade Agreement provides for negotiations to take place annually to settle quotas for trade in both directions in consumer goods and in other goods where open general licence arrangements are not in force. Both sides have agreed that it is convenient to settle quotas for an initial period of eighteen months to take account of the six months in the second half of 1964 before the start of a new calendar year.

Over 90 per cent of Anglo-Soviet trade takes place outside these quotas. Most of the Soviet Union's exports to the United Kingdom enter freely under open general licence, as confirmed in the Trade Agreement. Most of Britain's exports consist of capital goods which are bought by the Soviet Union in accordance with Article 3 of the Agreement and for which no specific quotas are settled in advance.

During 1963 imports from the USSR amounted to £91 million c.i.f. Exports from the United Kingdom to the USSR totalled £55.4 million f.o.b. and re-exports £8.5 million.

United Kingdom Consumer Goods for Import into the USSR from July 1, 1964 to December 31, 1965. (Article 4).

	£'000 f.o.b.
1. Motor vehicles (including passenger cars, motor cycles, motor scooters and mopeds, pedal bicycles) and spare parts and accessories	200
2. Woollen piece-goods	360
3. Made-up clothing	315
4. Cotton piece-goods	300
5. Knitwear	515
6. Stockings and socks	195
7. Leather of different kinds	10
8. Leather gloves	40
9. Leather footwear	1,315
10. Carnets including sheepskins	100
11. Toilet preparations	10
12. Medicines, drugs and pharmaceuticals and raw materials used in their manufacture	300
13. Salted herrings	150
14. White fish	490
15. Sugar confectionery and chocolate	10
16. Whisky and gin	20
17. Photographic materials	10
18. Toys	30
19. Sports goods, including sports apparel	20
20. Musical instruments	25
21. Earthenware and china	10
22. Razors and razor blades	200
23. Flax canvas	60
24. Paint	10
25. Sporting guns and ammunition	20
26. Furniture	40
27. Mechanical lighters and liquid gas containers	5
28. Miscellaneous consumer goods to be agreed with the Soviet Trade Delegation	210
	Total £4,970 f.o.b.

Notes:

Import licences for an amount equal to one-third of these quotas may be authorized during the second half of 1964, and for an amount equal to two-thirds in 1965.

Any unused part of the quota for salted herrings (quota 13) may be used for the export of white fish (quota 14) in addition to the above quota of £490,000 for that item.

Soviet consumer goods for import into the United Kingdom from July 1, 1964 to December 31, 1965 (Article 4).

	£'000 c.i.f.
1. Motor cars (including spare parts)	165
2. Cameras	350
3. Photographic accessories	35
4. Wrist watches	250
5. Alarm clocks	30
6. Optical goods (binoculars, projectors, lenses, etc.)	40
7 Sewing machines and parts	60
8. Matches	260
9. Musical instruments	75
10. Hand-made carpets	800
11. Medicines, drugs and pharmaceuticals (and raw materials used in their manufacture)	200
12. Toys	95
13. Handicrafts and fancy goods	65
14. Canned crabmeat	820
15. Canned salmon	870
16. Vodka and other spirits based on vodka	130
17. Wine, brandy and liqueurs	25
18. Caviar	130
19. Salmon roe	20
20. Cotton fabrics	80
21. Cotton grey cloth for processing and re-export	120
22. Silk fabrics	30
23. Perfumery	10
24. Metallic hollow-ware and household appliances excluding enamelled ware. (Of which not more than: £60,000 for aluminium hollow-ware; £25,000 for galvanized hollow-ware (of which not more than £7,000 for buckets), and £20,000 for cutlery)	150
25. Earthenware and china	40
26. Glassware (of which not more than £40,000 decorated glassware)	65
27. Sports guns and cartridges	75
28. Rubber boots	20
29. Toilet soap	25
30. Office materials (of which not more than £20,000 for pencils)	60
31. Dried and canned fruits and vegetables	10
32. Dried bilberries	35
33. Cranberries	15
34. Nuts	10
35. Miscellaneous consumer goods to be agreed by the Board of Trade	300
	Total £5,465 c.i.f.

Notes:

Import licences for an amount equal to one-third of these quotas will be available in the second half of 1964 and for an amount equal to two-thirds in 1965.

Any unused part of the quota for vodka and other spirits based on vodka (quota 16) may be used for the import of wines, brandies and liqueurs (quota 17) in addition to the quota of £25,000 for the latter.

ANGLO-SOVIET TRADE AGREEMENT ARTICLE 2(2) QUOTAS

Soviet goods for import into the United Kingdom from July 1, 1964 to December 31, 1965.

Total amount - up to £4,325 million c.i.f.

Machinery and equipment to a total value of £3.9 million c.i.f. of the following classes:

1. Machine tools to a total value of £750,000 of which not more than £112,500 for any one of the following classes. †

Turning machines
Milling machines
Grinding machines
Shaping, planing and slotting machines
Gear cutting machines
Drilling and boring machines
Other metal cutting-machines

and not more than £187,500 for

(Continued on next page)

UK AND USSR, *continued*

Metal forming machines (e.g. drop forges, presses, etc.)

† Subject to increases, by agreement with the Board of Trade, within an upper limit of £187,500 for each class of tool, where either an order for a single machine or orders for machines for which there is no United Kingdom equivalent take up a major part of the £112,500 for a particular category.

2. Earth-moving equipment and machinery, including excavators and construction equipment.
3. Mechanical-handling equipment (cranes, transporters, conveyors, industrial lifts and elevators, fork lift trucks, etc.).
4. Equipment for the peat industry.
5. Agricultural tractors, mainly wheeled.

Note:

(a) Tractors over 50 h.p. will be regarded as proper to Item 2 – construction equipment.

(b) Subject to an upper limit of £150,000 c.i.f. on tractors below 10 h.p.

6. Mining machines and equipment, including coal-mining equipment.
7. Gas and arc welding equipment.
8. Chemical, refrigeration and compressor equipment, and equipment for the rubber industry.
9. Electrical equipment, including generators, motors, transformers, etc.
10. Printing and textile machinery.
11. Equipment for the food industry.
12. Tools for cutting metal and wood, including those made of hard alloys and abrasives; fitting and erecting tools, chucks, hand electric and pneumatic tools; measuring instruments, including those for optical use, and radio electrical measuring instruments.

Note:

Delivery of goods of classes 2 to 12 will not exceed £300,000 c.i.f. for any one of the classes.

13. Ball and roller bearings (not to exceed £150,000).
14. Radio and electronic components (not to exceed £112,500) of which not more than £22,500 for transistors.
15. Other industrial and mechanical equipment, apparatus and tools (to be agreed with the Board of Trade). Not more than £300,000 for each category.

Scientific, optical and industrial instruments, to a total value of £225,000 c.i.f.:-

1. Measuring instruments
2. Optical instruments
3. Instruments and machines for testing metals
4. Radio-measuring apparatus
5. Physical and scientific instruments for experimental work in schools and higher educational establishments.

Note:

Delivery of goods of classes 1 to 5 will not exceed £60,000 c.i.f. for any one of the classes.

Sundry goods

Window glass – imports not to exceed £200,000 c.i.f. (of which not more than £70,000 c.i.f. for glass of less than 3 mm. nominal thickness).

ANGLO-SOVIET TRADE AGREEMENT
ARTICLE 2(2) QUOTAS

United Kingdom goods for export to the USSR from July 1, 1964 to December 31, 1965.

	£'000 f.o.b.
1. Scientific, optical, industrial and other instruments	1,200
2. Chemical goods, including dyestuffs and polyethylene	1,200
3. Man-made fibres and yarns	800
Total	£3,200 f.o.b.

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United Kingdom and Tunisia

By an exchange of notes between the Governments of the United Kingdom and Tunisia, the trade agreement between the two countries, which was valid for the period November 1, 1960 to October 31, 1961, has been extended for a further year until October 31, 1964. The following changes have been made to the quota list:

Whisky: Quota increased from £9,000 to £14,000.

Passenger cars and public transport vehicles: Quota increased from £75,000 to £85,000.

Tractors (previously licensed under the miscellaneous quota): New quota of £300,000.

The full quota list was given in the *Board of Trade Journal* of January 27, 1961 (page 216).

Double taxation relief - UK and Canada

THE Department of Inland Revenue announced on June 26 that as a result of the notice of termination given by the Government of Canada, the Agreement for the Avoidance of Double Taxation with respect to Taxes on Income between Canada and the United Kingdom will cease to have effect as regards Canadian tax for any taxation year ending in or after 1965; and as regards United Kingdom tax it will cease to have effect in the case of Income Tax for 1965/6 and subsequent years of assessment, in the case of Surtax for 1964/5 and subsequent years of assessment, and in the case of Profits Tax from January 1, 1965.

The Government of Canada have indicated their willingness to negotiate a fresh agreement.

Poland and Turkey

IT WAS ANNOUNCED in the Official Turkish *Gazette* dated May 13, 1964 that a protocol supplementing the Trade and Payments Agreement of 1948, was signed in Warsaw on March 21 for the year commencing April 1, 1964.

Under this protocol Poland will export to Turkey chemical and pharmaceutical products, photographic apparatus and materials, paper and paper board, man-made fibres, rolled mill products, machine tools, diesel and internal combustion engines, machinery for industry and agriculture, electrical machinery and equipment, also motor vehicles, motor cycles, accessories and parts.

In return Turkey will export to Poland citrus fruit, tobacco, cotton, walnut logs, walnut veneer and wood veneer, fish meal, fish oil, manganese and iron ore, concentrated zinc and boracite.

Detailed information on the quotas is available.

All inquiries relating to this notice should be addressed to Commercial Relations and Exports Department, Board of Trade, 1 Victoria Street, London, S.W.1. (Tel. Abbey 7877. Ext. 2258), quoting reference C.R.E. 5740G.

Yugoslavia and Indonesia

ACCORDING TO YUGOSLAV press reports, at the end of recent Yugoslav-Indonesian economic talks, protocols were signed in Belgrade on May 13, 1964. The protocols were on the settlement of financial questions and on the exchange of goods between the two countries.

The texts of the protocols have not been published and consequently no further information about them is available.

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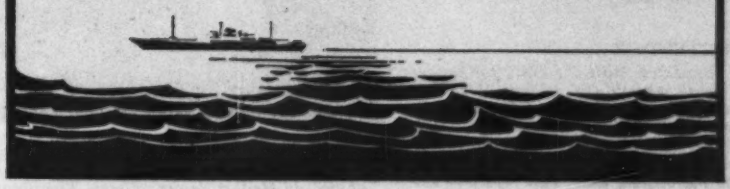

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Head Office: 38 Bishopsgate, London, E.C.2.
Manchester Office: 52 Mosley Street, Manchester, 2.
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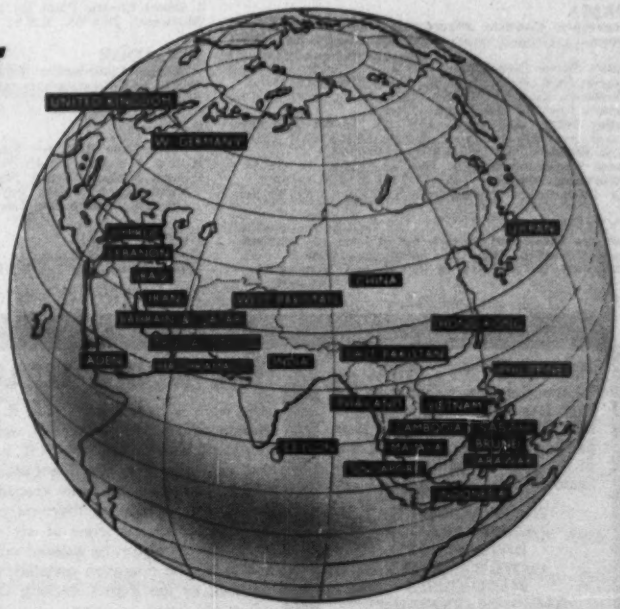

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Information for exporters

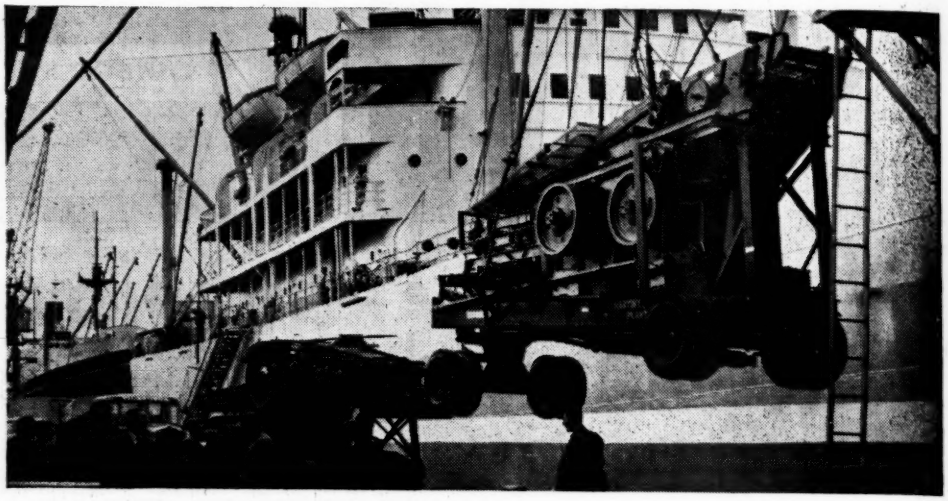
Brief details are given below of overseas inquiries for British products, contracts open for tender, reports on commercial conditions abroad, export trade openings, etc., issued recently by the Export Services Branch, Board of Trade, to subscribers to the 'Export Service Bulletin'.

The Bulletin, published daily, is available to manufacturers and exporters at a subscription of £10 10s. a year. A subscription form can be obtained from the Export Services Branch, Board of Trade, Room H35, Hillgate House, 35 Old Bailey, London, E.C.4. (Tel. City 5757, Ext. 433) (Telex 25977). Copies of particular issues containing further details of the items referred to below can be obtained from the same address by forwarding cash remittance of 2s. per copy with order.

CALLS FOR TENDER

Inquiries connected with the calls for tender mentioned below should be addressed to the Export Services Branch, Board of Trade, Hillgate House, 35 Old Bailey, London, E.C.4, (Tel. City 5757, Extension 404 and 406). Please quote reference numbers in all inquiries. The date given is the closing date, and refers to the current year unless otherwise indicated.

Tender documents are available on loan in those cases marked with an asterisk.*



Two mobile crushing and screening plants built by Frederick Parker Ltd., Leicester, being loaded at Tilbury Dock, London, recently for shipment to Arabia for work on the rebuilding of the old Hedjaz desert railway. The plant was supplied to Martin Cowley Ltd., Civil engineers, who with Alderton Construction Co., have been awarded a £10 million contract to carry out the work.

AUSTRALIA

Building and Electrical Projects for National University, Canberra. July 21. E.S.B. 18523/64.*
Steel Poles for State Electricity Commission, Queensland. July 15. E.S.B. 18891/64.*
Transformers for Townsville Regional Electricity Board. August 5. E.S.B. 18892/64.
Electricity Commission of New South Wales:
Transformers. August 3. E.S.B. 18834/64.*
Transformers. August 10. E.S.B. 18836/64.*
Voltage Regulators. (Further Information.) Closing date postponed to July 27. E.S.B. 15796/64.*

BURMA

Conveyors; Concrete Mixers and Vibrators; Air Compressors for Defence Department. July 20. E.S.B. 19172/64.*
People's Stores Corporation:
Quartz; M.S. Strips. July 14. E.S.B. 18524/64.*
Chemicals. July 15. E.S.B. 18833/64.*
Butter. July 20. E.S.B. 19131/64.*
Bailey Bridge and Parts. July 25. Tender documents now available for loan. E.S.B. 19165/64.*
M.S. Sections. July 25. E.S.B. 19166/64.*
Cable Suspension Bridges. July 25. E.S.B. 19167/64.*
Vulcanizing Machine. July 17. E.S.B. 19169/64.*
Air Compressors; Pumps. July 17. E.S.B. 19170/64.*

CEYLON

Asbestos Sheets and Specials for Ministry of Communications, Colombo. August 5. E.S.B. 18518/64.*
Incubators for Ministry of Health and Housing. Further Information.) Tender documents now available. E.S.B. 18018/64.*
Metering Equipment for Ministry of Land, Irrigation and Power. August 4. E.S.B. 18530/64.*

CHILE

Tank Wagons for Direcion de Aprovisionamiento del Estado. July 14. E.S.B. 18392/64.*

COLOMBIA

Construction of Bridge for National Railways. July 27. E.S.B. 19127/64.
Construction Project for Corporacion Autonoma Regional del Cauca (C.V.C.). July 27. E.S.B. 18851/64.
Diesel Electric Plant for Instituto Nacional de Fomento Municipal. July 31. E.S.B. 18830/64.*

ECUADOR

Bridge Construction Project for Ministry of Public Works and Communications. (Further Information). E.S.B. 23310/62.

EGYPT

Paper Tape Rolls for Telecommunications Organization. August 4. E.S.B. 18849/64.*
Helwan Military Factory No. 9:
Refractory Materials. July 18. E.S.B. 19162/64.*
Graphite; Electrodes. July 15. E.S.B. 19163/64.*

FORMOSA

Central Trust of China:
Steel Plate. July 14. E.S.B 7542/64.*
Insecticides. July 22. E.S.B. 18845/64.*
Pharmaceuticals July 24. E.S.B. 18847/64.*
Chemicals. July 21. E.S.B. 19114/64.*
Chemicals. July 23. E.S.B. 19115/64.*
Wire Terminals and Connectors. July 18. E.S.B. 19116/64*
Bottle Filling and Sealing Machine. July 16. E.S.B. 19117/64.*
Steel Sheets. (Further Information.) July 15. E.S.B. 10509/64.*
Babbit Metal. (Further Information.) July 15. E.S.B. 14971/64.*
Cement. July 18. E.S.B. 18838/64.*
Gate and Globe Valves. July 22. E.S.B. 18839/64.*
Wire and Anchorages. July 22. E.S.B. 18840/64.*
Pipeline. July 22. E.S.B. 18841/64.*
Power Fuses. July 22. E.S.B. 18842/64.*
Steel Roller Chain. July 22. E.S.B. 18843/64.*
Steel Boiler Tube. July 23. E.S.B. 18844/64.*
Hand Tools. July 20. E.S.B. 18846/64.*
Chemicals. July 22. E.S.B. 19110/64.*
Chemicals. July 20. E.S.B. 19118/64.*
Vacuum Pump. July 24. E.S.B. 19119/64.*
Blower. July 24. E.S.B. 19120/64.*
Camera and Accessories. July 23. E.S.B. 19122/64.*

FRANCE

Telephone Sets for Supreme Headquarters Allied Powers Europe. August 3. E.S.B. 18880/64.*
Building Construction for Secretariat General a la Marine Marchande. July 15. E.S.B. 18558/64.*
Building Construction for Centre Hospitalier Regional de Caen. July 15. E.S.B. 18557/64.*

No. 1 of a series

Issued for the information of Exporters who would soon feel the benefit of entrusting their packing and transportation to one of the most experienced organisations in the business

THE PACKING AND TRANSPORTATION DIVISIONS OF LLOYD'S PACKING WAREHOUSES GROUP OF COMPANIES

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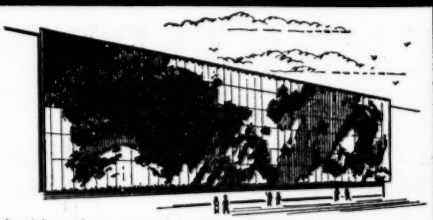


The world's largest mural, 200 ft. x 50 ft., painted by Stefan Knapp on glass fused to steel, weighing 52 tons and consisting of 280 panels each 8 ft. x 4 ft., had to be packed in England and delivered to a department store in Paramus, New Jersey, U.S.A. It was housed in specially reinforced and padded cases, shipped by ss *Maronia* and delivered to the store by road. It took a crew of six men about one month to hang the mural on the exterior wall of the store, as compared with only seven days to pack and transport it. An individual operation certainly, but the same meticulous care is given to all the recurrent exports which are handled by the Export Packing Division of Lloyd's Packing Warehouses Group of Companies.

THE EXPORT PACKING DIVISION
of the LLOYD'S PACKING WAREHOUSES GROUP OF COMPANIES
Head Office: 20 PRINCESS STREET · MANCHESTER 1 · *Telephone:* CENtral 4400

GREECE

Ministry of Trade:
Boots. July 20. E.S.B. 18566/64.*
Vehicles. July 16. E.S.B. 18565/64.*
Surveying Equipment. August 10. E.S.B. 18560/64.*
Photocopying Machine. July 16. E.S.B. 18562/64.*
VHF Receivers for Ministry of Trade. August 13. E.S.B. 18561/64.*
Photogrammetric Machinery. August 13. E.S.B. 18564/64.*

INDIA

Cableway with Operating Gear for Rana Pratap, Sagan and Kota Dam Project. (Further Information.) July 31. E.S.B. 4279/64.*
Conveyor Belting for Singareni Collieries Co. Ltd. July 16. E.S.B. 18806/64.
Crane for Indian State Railways, West Bengal. (Further Information.) August 8. E.S.B. 15266/64.*
Pumping Plant for Commissioners of the Port of Calcutta. (Further Information.) Closing date postponed to July 24. E.S.B. 10311/64.
Semi-Trailers and Pulling Units for U.P. State Electricity Board. July 27. E.S.B. 18862/64.
Switchgear for Maharashtra State Electricity Board. Closing date postponed to July 20. Tender documents now available. E.S.B. 17016/64.*
Tin and Copper Ingots for Hindustan Aircraft Ltd. July 29. E.S.B. 18583/64.*
Transformers for Gujarat Electricity Board. July 30. E.S.B. 18865/64.
Madras State Electricity Board:
Cables. July 15. E.S.B. 18588/64.*
Coal Handling Plant. (Further Information.) July 24. E.S.B. 6243/64.*
Hudustan Shipyard Ltd.:
Cranes. (Further Information.) July 20. E.S.B. 13788/64.*
Electrical Navigational Equipment. Closing date July 15. E.S.B. 18824/64.
The Director General Supplies, Disposals:
Guillotine Shearing Machine. August 18. E.S.B. 18576/64.*
Hydraulic Press. July 30. E.S.B. 18888/64.*
Wire Rope. July 14. E.S.B. 18887/64.*
Atomic Energy Establishment.
Inconel Plates, Strips and Tubes. August 10. E.S.B. 18867/64.*
Potentiostat. (Further Information.) Tender documents now available. E.S.B. 18378/64.*
Zirculoy Scrap. July 21. E.S.B. 18866/64.*
National Coal Department Corporation Ltd.:
Air Compressor. July 17. E.S.B. 18802/64.*
Laboratory Equipment. July 15. Specifications only available. E.S.B. 18801/64.*
Sand Pump and Separator. (Further Information.) Closing date postponed to July 16. E.S.B. 15728/64.*
National Mineral Development Corporation:
Electrical Equipment. (Further Information.) August 11. E.S.B. 17378/64.*
Vehicles; Cranes; Drilling Equipment. (Further Information.) August 20. E.S.B. 17380/64.*
Machine Tools; Welding Sets; Testing Equipment. (Further Information.) August 12. E.S.B. 17379/64.*
Foundry Equipment; Workshop Equipment. August 18. E.S.B. 18860/64.
Procurement Circle:
Centrifugal Casting Machines. July 23. E.S.B. 18577/64.
Roller Bearings. August 10. E.S.B. 18579/64.
Crank Shaft Grinding Machine. September 21. E.S.B. 18581/64.
Drilling Equipment. August 19. E.S.B. 18807/64.*
Industrial Valves. August 24. E.S.B. 18580/64.
Testing Instrument. July 20. E.S.B. 18864/64.

IRAQ

Artillery Range Equipment for Ministry of Defence. August 30. E.S.B. 18825/64.*
Electrical Set for Ministry of Municipal and Village Affairs. August 4. E.S.B. 18823/64.
Truck for Administration of Distribution of Oil Products. August 5. E.S.B. 18826/64.

JORDAN

Bread Slicing and Packing Machine and Paper for Jordan Armed Forces. July 15. E.S.B. 18810/64.*

KOREA

Office of Supply:
Air Conditioning System. July 18. E.S.B. 18540/64.*
Railroad Bars and Ties; Lamps; Creosote. July 16. E.S.B. 18543/64.*
Chemicals. July 16. E.S.B. 19149/64.*
Film. July 15. E.S.B. 19148/64.*
Chemicals. July 14. E.S.B. 19150/64.*
Generators; Telex Equipment; Cables; Heating System Accessories. July 18. E.S.B. 18537/64.*
Railway Transport Equipment. July 23. E.S.B. 19146/64.*

KUWAIT

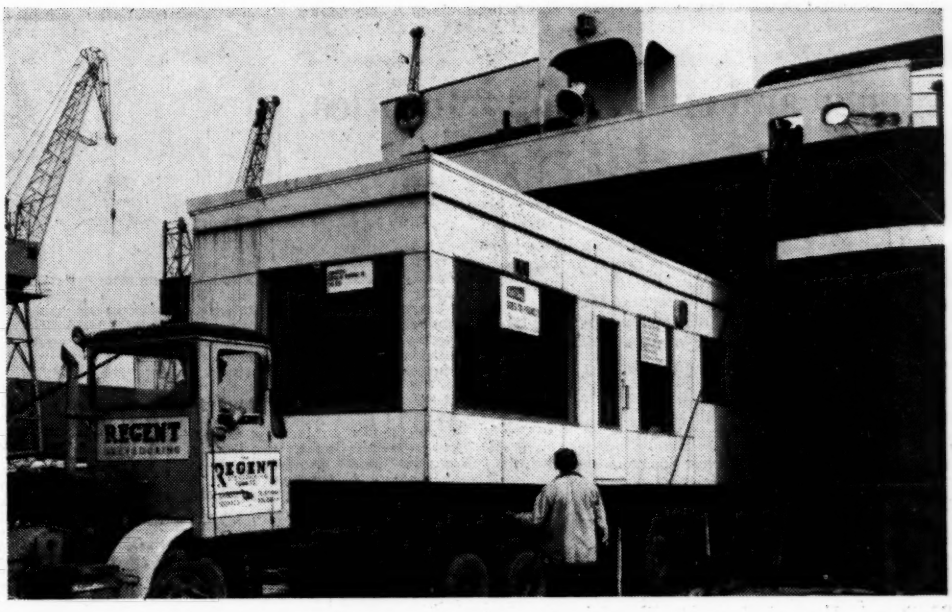
Steel Pipes and Fittings for Ministry of Electricity and Water. July 26. E.S.B. 19160/64.*

LEBANON

Fire-Fighting Equipment; Life Rafts for Direction de l'Aviation Civile. June 29. E.S.B. 18808/64.*.

MALAYSIA

Textile Equipment and Plant; Electrical Air-Conditioning Equipment for Malaysia Textile Industries Ltd. Closing date not known. E.S.B. 18956/64.
Public Utilities Board:
Pipe Fittings. July 22. E.S.B. 18899/64.*
Water Measuring Instrument. August 11. E.S.B. 18550/64*



The first of eight fully equipped restaurants designed by Lockhart Engineering Ltd., Reading, for siting at large petrol filling stations in France, being driven aboard the m.v. 'Cerdic Ferry' at Tilbury recently on the Transport Ferry Service's run to Antwerp. The project has been organized between 'Little Chef,' a member of the Trust House group, and Shell.

NEW ZEALAND

Cranes and Gantry for Bechtel Corporation. E.S.B. 18883/64.
Dusters and Towels for Ministry of Works. July 27. E.S.B. 18886/64.*
Stationery Sundries for Government Printing Office, Wellington. July 29. E.S.B. 19101/64.*
New Zealand Electricity Dept.:
Transformers. September 15. E.S.B. 18884/64.*
Transformers. September 8. E.S.B. 18885/64.*
General Post Office:
Concrete Vibrators. July 28. E.S.B. 18882/64.*
Electrical Equipment. July 24. E.S.B. 18551/64.*
Spare Parts for Batteries. July 30. E.S.B. 19112/64.*
Hand Lathe Tools. July 30. E.S.B. 19113/64.*
Line Accessories. July 29. E.S.B. 19103/64.*
Wire. July 28. E.S.B. 18881/64.*
Electric Lamps. July 27. E.S.B. 18898/64.*

NICARAGUA

Irrigation Scheme for Empresa de Riego de Rivas. July 15. E.S.B. 18896/64.*
Waterworks Apparatus and Fittings for Empresa Aguadora de Managua. July 15. E.S.B. 18895/64.

NORTHERN RHODESIA

Central Supply and Tender Board:
Medical Supplies. July 17. E.S.B. 18816/64.*
Medical Equipment. July 17. E.S.B. 18815/64.*
Uniform Caps. July 17. E.S.B. 18817/64.*

NYASALAND

Central Tender Board:
Bridge Construction Project. July 24. E.S.B. 18814/64.
Bridge Construction Project. July 24. E.S.B. 18813/64.
Bridge Construction Project. July 24. E.S.B. 18812/64.

PANAMA

Construction of Hydroelectric Project for Institute of Hydraulic Resources and Electrification. September 4. E.S.B. 18549/64.*

PAKISTAN

Air Conditioning Equipment for Telegraph and Telephone Directorate. July 27. E.S.B. 18858/64.
Railway Equipment Miscellaneous for West Pakistan Railway Board. August 3. E.S.B. 18567/64.

SAUDI ARABIA

Bicycles and Motor Cycles for Ministry of Communications. August 16. E.S.B. 18804/64.
Tents for Ministry of Defence. July 18. E.S.B. 18574/64.

SOUTH AFRICA

Transmitters for South African Broadcasting Corporation, Johannesburg. July 29. E.S.B. 18894/64.
Transvaal Provincial Administration:
Concrete Mixers. July 17. E.S.B. 19157/64.*
X-Ray Unit. July 17. E.S.B. 19156/64.*
Pharmaceuticals. July 31. E.S.B. 19158/64.*
State Tender Board:
Aerodrome Visual Approach Equipment. July 15. E.S.B. 18535/64.*
Theodolites. July 14. E.S.B. 19124/64.*
Nylon Fabric. July 14. E.S.B. 19125/64.*
Transformers. July 28. E.S.B. 19153/64.*
Battery Chargers. July 29. E.S.B. 19154/64.*
Aerials and Masts. July 27. E.S.B. 19155/64.*

SOUTH VIETNAM

Welding Electrode Manufacturing Plant for Dakim Welding Supply Co. Ltd. (Further Information.) Closing date postponed to July 15. E.S.B. 11824/64.*

SOUTHERN RHODESIA

Refuse Vehicles for City of Salisbury. July 28. E.S.B. 18822/64.*

SPAIN

Irrigation Dam Works; River and Water Supply Works for Ministerio de Obras Publicas. July 14. E.S.B. 18552/64.
Television Equipment (Valves) for Ministerio de Information y Turismo. July 14. E.S.B. 19173/64.

SUDAN

Chemicals for Ministry of Comerce, Industry and Supply. July 20. E.S.B. 18544/64.
Radio Telephone Equipment for Ministry of Communications. July 30. E.S.B. 18872/64.*
Table Forks; Tight Tins for Stores and Equipment Department. July 18. E.S.B. 18871/64.
Sudan Gezira Board:
Drilling Rig. July 21. E.S.B. 18857/64.*
Fire Fighting Equipment. July 25. E.S.B. 18875/64.*

THAILAND

Metropolitan Electricity Authority:
Cable. July 31. E.S.B. 18869/64.*
Pole Line Hardware. July 21. E.S.B. 19175/64/D.L.F.*
State Railway of Thailand:
Creosote Oil. July 28. E.S.B. 18877/64.
Lantern Frames. July 16. E.S.B. 18889/64.
Railway Oil Tank Wagons. September 15. E.S.B. 18870/64.*
Route Relay Interlocking. July 23. E.S.B. 18890/64.*

TRINIDAD AND TOBAGO

Vehicles for Trinidad and Tobago Electricity Commission. July 25. E.S.B. 18525/64.*

TURKEY

Steel Making Tools for State Railways Administration. July 17. E.S.B. 19152/64.*
Land Registrar Office:
Stereo Comparator Registered Equipment. July 15. E.S.B. 19151/64.*
Surveying Equipment. July 15. E.S.B. 18811/64.*
Turkish Maritime Bank:
Lathe. July 17. E.S.B. 18590/64.*
Steering Gear. July 24. E.S.B. 18874/64.*
Steel Structural Shapes. July 20. E.S.B. 18876/64.*

URUGUAY

Consultancy Service (Prequalification) for Ministry of Public Works. July 15. Tender notice in Spanish available, E.S.B. 18693/64.*

Agency and export opportunities, market reports, etc.

Further details of the items referred to below can be obtained from the Export Services Branch, Board of Trade, Hillgate House, 35 Old Bailey, London, E.C.4. (City 5757, Ext. 427). Please quote reference numbers in all inquiries

Afghanistan
Agency inquiry for miscellaneous items. (E.S.B. 18688/64.)
Inquiry for clocks and watches; domestic appliances; electrical equipment; pumps; radios; woollen piece goods. (E.S.B. 18701/64.)

All Countries
Successful bidders for overseas contracts. (E.S.B. 76/64.)

Australia
Agency inquiry for refrigerators. (E.S.B. 18408/64.)
Inquiry for constructional hobbyists kits; photographic accessories; metal working tool accessories. (E.S.B. 15042/64.)
Manufacture under licence – vehicle lamps. (E.S.B. 18934/64.)

Austria
Agency inquiry for coffee. (E.S.B. 18488/64.)
Agency inquiry for store room installations; self-service equipment. (E.S.B. 18487/64.)
Agency inquiry for knitwear. (E.S.B. 18489/64.)
Agency inquiry for miscellaneous goods; rum; whisky; textiles. (E.S.B. 18484/64.)
Agency inquiry for beverages. (E.S.B. 18485/64.)
Agency inquiry for textile piece goods; underwear; technical novelties. (E.S.B. 18490/64.)
Agency inquiry for machine tools and spares; precision machinery. (E.S.B. 18482/64.)
Inquiry for grinding materials; tools; woodworking machinery. (E.S.B. 18481/64.)
Inquiry for leather. (E.S.B. 18486/64.)
Inquiry for camping equipment; china; electrical household appliances; garden articles; hardware; tools. (E.S.B. 18483/64.)

Bolivia
Inquiry for gloves; leather handbags. (E.S.B. 7678/64.)

Canada
Agency inquiry for dresser sets; leather goods; sporting goods; toys and games. (E.S.B. 18441/64.)
Inquiry for rocker arm pins; valves. (E.S.B. 15027/64.)
Inquiry for consumer shelf products; foodstuffs; health and beauty aids; building materials; hardware; household furnishings. (E.S.B. 18953/64.)
Inquiry for concentrated berry juice. (E.S.B. 40600/63.)

Costa Rica
Agency inquiry for toilet preparations; hair brushes. (E.S.B. 16407/64.)

Cuba
Inquiry for printing press. (E.S.B. 18638/64.)

Denmark
Agency inquiry for handkerchiefs; women's housecoats. (E.S.B. 17185/64.)

Finland
Agency inquiry for foundry raw materials – further information. (E.S.B. 16718/64.)
Agency inquiry for diesel generating sets; road rollers. (E.S.B. 17550/64.)

France
Agency inquiry for agricultural equipment; fertiliser spraying equipment. (E.S.B. 18473/64.)
Agency inquiry for electrical gadgets; electro mechanical instruments; optical equipment; tools. (E.S.B. 18782/64.)
Agency inquiry for boats; electrical household equipment; shoes; toys. (E.S.B. 18942/64.)
Inquiry for chocolate; confectionery; jams. (E.S.B. 17587/64.)
Market report on Bourges and its region. (E.S.B. 18157/64.)
Market report on Indre-et-Loire. (E.S.B. 17978/64.)
Market report on Loir-et-Cher. (E.S.B. 17948/64.)

Germany, Federal Republic of
Agency inquiry for knitwear. (E.S.B. 18465/64.)
Agency inquiry for lining materials; woollen piece goods. (E.S.B. 18982/64.)
Agency inquiry for face cloths. (E.S.B. 18451/64.)
Inquiry for concrete shuttering system. (E.S.B. 18456/64.)

Greece
Agency inquiry for man-made fibres; suitings; wool tops. (E.S.B. 18120/64.)

Honduras, Republic of
Inquiry for bottles; pharmaceutical raw materials. (E.S.B. 18404/64.)

Hong Kong
Inquiry for silicon steel sheet. (E.S.B. 14773/64.)

India
Inquiry for artists materials; artificial silk yarn; metal jewellery clasps. (E.S.B. 18674/64.)

Iran
Agency inquiry for orthopaedic supplies. (E.S.B. 18651/64.)
Inquiry for embroideries; woollen fabrics. (E.S.B. 18207/64.)

Israel
Inquiry for brass pipe fittings. (E.S.B. 18185/64.)

Italy
Inquiry for pharmaceutical chemicals. (E.S.B. 14229/64.)
Collaboration – electronic and electromechanical equipment; telecommunications equipment. (E.S.B. 18470/64.)

Jamaica
Agency inquiry for agricultural and garden tools; builders' and plumbers' hardware; sanitaryware; cutlery. (E.S.B. 18497/64.)
Agency inquiry for sanitary-ware. (E.S.B. 18754/64.)
Inquiry for net lead. (E.S.B. 18757/64.)

Japan
Inquiry for non-ferrous metals. (E.S.B. 18446/64.)

Jordan
Inquiry for ice cream powder. (E.S.B. 16190/64.)

Malaysia
Agency inquiry for bedsteads; sanitaryware. (E.S.B. 18697/64.)

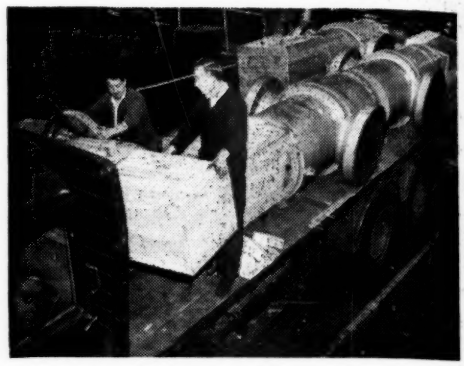
Netherlands
Inquiry for men's woven scarves. (E.S.B. 18694/64.)

Nicaragua
Bonded warehouse facilities.

Nigeria
Market report on chemicals and dyestuffs used in the textile industry. (E.S.B. 16108/64.)

Norway
Market report on buttons. (E.S.B. 14591/64.)

Pakistan
Inquiry for G.I. sheets; wire. (E.S.B. 18203/64.)



Part of a consignment of pipeline valves which are being supplied by the Newman Hender Group of Woodchester, Stroud, Glos., for Brazil for use on a seventeen million dollar oil pipeline. The 220 mile pipeline is being constructed by Petrobras, a company owned by the Brazilian Government.

Peru
Agency inquiry for marine supplies and equipment; nylon brushes; power tools; welding equipment; metal sheets and tubing. (E.S.B. 18752/64.)

Philippines Republic
Inquiry for building materials; catering equipment; electrical equipment and appliances; hardware; hospital equipment; household furnishings; tools. (E.S.B. 12999/64.)
Inquiry for heavy equipment machinery. (E.S.B. 18192/64.)

Portugal
Inquiry in respect of combustion engines factory. (E.S.B. 18450/64.)

South Africa
Agency inquiry for aluminium foil; glassware and crockery; printed box tops; domestic hardware; jams. (E.S.B. 18872/64.)
Inquiry for industrial chemicals. (E.S.B. 17130/64.)

Switzerland
Agency inquiry for domestic electrical appliances; record players. (E.S.B. 18996/64.)
Agency inquiry for paint manufacturing equipment. (E.S.B. 18925/64.)
Agency for grinding machines. (E.S.B. 18926/64.)
Agency inquiry for electronic medical equipment; hospital equipment and supplies. (E.S.B. 18786/64.)
Agency inquiry for tools; tungsten carbide; milling machinery. (E.S.B. 18442/64.)
Agency inquiry for giftware; jewellery. (E.S.B. 19020/64.)
Inquiry for building machinery; conveying systems; storage racks; technical novelties. (E.S.B. 18257/64.)
Inquiry for asbestos underlays. (E.S.B. 17739/64.)

Trucial States
Inquiry for calcium carbide; paints. (E.S.B. 18716/64.)

Turkey/Israel
Trade Agreement. (E.S.B. 174/64.)

United States of America
Agency inquiry for baking equipment. (E.S.B. 19044/64.)
Inquiry for building products; industrial steel products. (E.S.B. 16945/64.)
Inquiry for vulcanized fibre. (E.S.B. 18632/64.)
Inquiry for electronic products. (E.S.B. 18422/64.)
Inquiry for aluminium sheets and tubing; copper tubing; steel sheets. (E.S.B. 18414/64.)
Inquiry for welding fittings. (E.S.B. 18932/64.)
Manufacture under licence – pneumatic conveyors. (E.S.B. 18771/64.)
Manufacture under licence – side-walls for tyres; tyres. (E.S.B. 17244/64.)

U.S.S.R.
Inquiry for giftware. (E.S.B. 19083/64.)

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Tariff, Customs and Import Regulations in overseas countries

REGISTERED TRADE MARK (RTM) GOODS IN OVERSEAS TARIFF LISTS

The Lists of Tariff, Customs and import regulation changes in overseas countries published in this section of the Journal sometimes contain words which are registered trade marks in the United Kingdom. So far as is practicable, all lists of goods are checked before publication from this point of view.

Items which fall into this category will now be preceded by the letters 'r t m'. Readers of the Journal should note that this prefix signifies that the words are registered as trade marks in the United Kingdom, but that in the present context they are assumed to refer generally to products of the description stated in brackets.

While every attempt will be made to ensure that the scrutiny is complete, the lists may contain other words which are registered as trade marks in the United Kingdom or in other countries but which it has not been possible to identify.

DOMINICAN REPUBLIC

Taxes on imports of foodstuffs

H.M. EMBASSY in Santo Domingo report that by Law No. 249, of May 11, 1964, Law No. 34 has been amended (see page 1388 of the *Board of Trade Journal* of December 19, 1963). The effect of the Law is now that for two years from December 1, 1963, the import of the food products listed below (the previous list is cancelled) is exempted from various duties and taxes, including those introduced under Law No. 173 of March 9, 1964, as amended by Law No. 221 of April 23, 1964.

Description

Herrings and smoked fish.
Cod and herrings and other dried, salted fish.
Corn starch.
Food preserves of animal origin, vegetables of all kinds (compotes) when it is stated on the containers that they are especially for children.
Milk, skimmed, homogenized and evaporated, compound medicinal formula, when it is stated on the containers that they are especially for children.

Customs tariff and import control changes

DOMINICAN REPUBLIC Law No. 6009 of August 18, 1962 (see page 592 of the *Board of Trade Journal* for September 14, 1962) is cancelled by Law No. 230 of April 29, 1964 and the customs duty for cigarettes is now as follows:—

Tariff No.	Description	Unit	New Duty	Old Duty
			R.D. $	
1084 (f)	Cigarettes, up to 7 cm. in length	Per 1,000	32.50	15.00
1084 (g)	Cigarettes, more than 7 cm. in length but not exceeding 10 cm.	per 1,000	35.00	15.50

Importation of cigarettes more than 10 cm. in length is prohibited.

Consolidation of import taxes

H.M. EMBASSY in Santo Domingo report that by Law No. 173 of March 9, effective from April 11, all the various import taxes additional to Customs Duties have been consolidated into one charge. The new tax rates were modified by Law No. 221 of April 23, 1964. Law No. 224 of April 25, 1964 and Law No. 231 of April 29, 1964. The list of tax rates given below incorporates all these amendments.

No.	Description	Unit	Tax Rate (Gold Pesos and/or *ad valorem*)
1	Heavy fuel oil (bunker fuel oil of up to 17° density, and with a specific gravity of not less than 0·955 at 15°C.)	1,000 litres	18·00
2	Mineral oil, crude or distilled, and petroleum, of more than 17° density, and with a specific gravity of not less than 0·955, for use as fuel (diesel oil, gas oil, etc.)	1,000 litres	32·00
3	Gasoline and naphtha	100 litres	18·00
4	Rectified or refined oils, such as petroleum, kerosene, paraffin, benzene and similar products (hydrocarbon oils)	1,000 litres	25·50
5	Crude oils derived from schists, crude petroleum, axle grease for cars and cart axles, crude mineral oils mixed with crude animal oils of any kind, and crude mineral oils mixed with crude vegetable oils, when these oils are exclusively destined for lubricating purposes or for floors	K.G.	0·02 + 25%
6	Special mineral oils and other lubricating oils, compound, refined or not, such as typewriter oils, sewing machine oils, oils for firearms, and, generally, lubricants for delicate machinery and apparatus	K.G.	0·025 + 25%
7	Propane gas and other similar gases used as fuel for stoves	K.G.	0·02
8	Ingots and pieces, unworked, of cast or wrought iron, steel, malleable cast iron and aluminium, classified under paragraphs 135, 136, 151, 152, and 331 of the import and export tariff		15%
9	Tin plate, in sheets, plain		10%
10	Paraffin, crude	K.G.	0·10
11	Tobacco, in the form of shreds, cut	K.N.	4·00
12	Sheet glass, including coloured, painted, enamelled, gilt, emery ground, worked, etched, frosted, bevelled or curved; rolled or polished glass		100%
13	Hides and skins included in paragraphs 789, 790 and 791 of the import and export tariff (Law 1488 of August 19, 1947)		55%
14	(a) Grey paper or kraft, or made up into envelopes, bags or sacks for any use, printed or not	K.G.	0·25+
	(b) Sulphite paper and wrapping paper of all weights and types	K.G.	0·40 + 35%
15	Denatured alcohol	Litre	1·55
16	Methyl alcohol	Litre	1·20
17	Ethyl alcohol in any container		75%
18	Tarpaulins of all kinds.		50%
19	Agricultural machinery included in paragraphs 861 and 863 of the import and export tariff		5%
20	Tools and implements of all kinds (other than machinery) employed in arts and crafts, not elsewhere specified		10%
21	Tools and implements employed in agriculture, included in paragraph 250 of the import and export tariff		5%
22	Medical instruments and apparatus of all kinds included in paragraph 211 of the import and export tariff		10%
23	Mathematical and scientific instruments of all kinds not elsewhere specified such as telescopes, spectroscopes, theodolites, microscopes, tachometers and other similar apparatus		10%
24	Tractors and their replacement parts, including engines		5%
25	Copper wire included in paragraph 279 of Article 9 of the import and export tariff and parts (a), (b) and (c)		40%
26	½ in. Conduit tubing		50%
27	Carpenters' nails, with heads	K.G.	0·05 + 35%
28	Flagstones, floor tiles and mosaics for buildings	K.G.	0·03 + 30%
29	White cement	K.G.	0·018
30	Paints in general		100%
31	Ordinary wood in the form of logs, sleepers, trunks, boards, planks, beams and stakes	K.G.	0·02 + 35%
32	Plywood and similar types of wood, in slabs, sheets or boards	K.G.	0·20
33	(rtm) 'Formica' and similar in rolls, sheets and any other non-manufactured form	K.G.	0·10 + 35%
34	Papier mache, worked or unworked, in the form of boards and building materials	K.G.	0·10 + 35%
35	Asphalt	1,000 K.G.	12·50
36	Passenger cars, including station wagon types	Up to RD $1,850·000	65%
		Over RD $1,850·000	95%
37	Motor cycles, motor scooters and similar vehicles for goods or passengers.		35%
38	Vans, motor buses and other vehicles for the transport of goods or passengers		30%
	Cargo lorries		20%
39	Rubber tyres for goods and passenger vehicles, except lorries		45%

(Continued on next page)

DOMINICAN REPUBLIC, *continued*

No.	Description	Unit	Tax Rate: Gold Pesos and/or *ad valorem*
40	Tyres and inner tubes for motor vehicles included in paragraph 1046 (b) of the import and export tariff		30%
41	Goods trailers and semi-trailers for transporting cargo		25%
42	Motor vehicle batteries		100%
43	Cotton fabrics	Lineal metre	0·15 + 40%
43 (a)	Cotton fabrics known as 'Fuerte Azul'	Lineal metre	0·30 + 40%
44	Oilcloth and cotton fabrics waterproofed with rubber, gum, oil, wax, tar, varnish and similar materials, and plastic cloth		60%
45	Fabrics of wool, artificial wool, flock wool, animal hair or waste of these materials, pure or mixed	Sq. metre	0·25 + 70%
46	Fabrics of natural or artificial silk, pure or mixed		100%
47	Fabrics of jute (except jute burlap or Calcutta gunny included in paragraphs 529 and 530 of the import and export tariff), ramie, flax, hemp and other vegetable fibres not mentioned elsewhere	Sq. metre	0·15 + 25%
48	Table and bed linen, towels, curtains, pillows, carpets and other similar articles for household use of any textile material		50%
	(a) Mattresses and quilts of all kinds		100%
	(b) Stockings and socks		100%
	(c) Hats of all kinds		60%
	(d) Brassieres		65%
	(e) Hair nets		65%
	(f) Made-up clothing in general		70%
	(g) Umbrellas		65%
	(h) Cotton sacks for packing		80%
	(i) Elastic ribbons		25%
	(j) Shoelaces		75%
	(k) Cotton belts, elastic or not		50%
49	Mosquito nets	K.N.	0·40 + 30%
50	Footwear of all kinds		100%
51	Gas stoves, and all stoves burning liquid fuel, their parts and accessories		40%
	(a) Electric stoves and their parts and accessories		100%
52	Ice-chests, refrigerators, beaters, toasters, vacuum cleaners, washing machines and other similar apparatus, their parts and accessories		100%
	(a) Electric ice-chests, not more than 10 cubic feet capacity		45%
53	Gramophones, radios, television sets, gramophone records, recording tape, cinematograph projectors and other similar apparatus, their parts and accessories		100%
54	Air-conditioning apparatus, parts and accessories		100%
55	Furniture of all kinds, including filing cabinets and their finished parts, and mattress supports, except adjustable hospital beds		100%
56	Table and household ware, figurines, flower vases and articles for indoor decoration, of faience, porcelain or glass	K.N.	0·10 + 35%
57	Juke boxes, electric guitars and other similar apparatus		200%
58	Photographic cameras in general and all parts thereof, photographic films and film packs, unexposed		100%
59	Precious and semi-precious stones and doublets, unset, imitations of precious stones and pearls		150%
60	Jewels, plate and wares of gold, silver or platinum, including salvers		150%
	(a) Wrist and pocket watches of all kinds		100%
61	Rings, brooches and pins, studs, cufflinks, earrings, watch and other chains, bracelets and other jewellery and personal ornaments, of gold or silver plate and their imitations	K.N.	2·25 + 35%
	(a) All other articles, gilt or silvered	K.N.	1·10 + 35%
62	Batteries, except for motor vehicles, cells, hooters, electric horns, spark plugs, sealed beams and other lamps		45%
63	Articles manufactured from hides and skins		100%
64	Brushes of bristle or vegetable fibres, except tooth brushes		100%
65	Combs and ornamental combs		100%
66	Brooms and mops		150%
67	Mop handles		100%
68	Cinematographic films introduced into the country for exhibition in theatres and cinemas	K.N.	4·75 + 35%
	Note: Cinematographic films introduced into the country for scientific and cultural purposes, when exhibited free of charge to the public, and newsreels, are taxable under paragraph 69.		
69	Other exposed cinematograph films not included in paragraph 68	K.N.	2·25 + 35%
70	Olive oil		60%
71	Garlic		40%
72	Onions		55%
73	Biscuits of cereal flour or pulses, sweetened or not	K.N.	0·25 + 35%
74	Confectionery and sweets of all kinds	K.N.	0·25 + 75%
	(a) Chewing gum	K.N.	0·80
75	Vermicelli, spaghetti, macaroni, cannelloni, prepared or not, and other similar foods made from wheat flour	K.N.	0·10 + 45%
76	Fruit juices, pure or with sugar in sufficient quantity to ensure preservation, neither fermented nor containing alcohol	Litre	0·15 + 20%
77	Fruits and berries, dried or dehydrated	K.N.	0·20 + 35%
	(a) Fresh fruit	K.N.	0·10 + 35%
78	Vegetables of all kinds, preserved or pickled, such as tomatoes, corn, peas, or green beans, pumpkins, cabbages, sweet peppers and in general, all preserved or pickled vegetables in containers of all kinds, except baby foods in special containers indicating their use	K.N.	0·20 + 45%
79	Vegetables, fresh, frozen, dried or dehydrated	K.N.	0·10 + 45%
80	Fruits preserved in their own juice, in syrup, in spirits or in water; marmalade, puree and jellies of fruits; crushed fruit and fruit pulp for flavouring ice cream and the like, except baby foods in special containers indicating their use	K.N.	0·25 + 45%
	(a) All other products containing sugar, not specially mentioned in this paragraph		45%
81	Flavouring extracts and preparations (not being medicinal essences or fluid or solid extracts for perfumery), sauces, condiments, and similar preparations commonly used for cooking and other purposes, including spices, except extracts and preparations for flavouring cordials and aerated beverages		50%
82	Almonds, hazelnuts, chestnuts, peanuts and nuts of any kinds, except peanuts for industrial use	K.N.	0·10 + 45%
83	Tobacco and cigarettes		100%
84	Beer in any kind of container	Litre	0·75 + 50%
85	Malt extracts and similar beverages	Litre	0·30 + 35%
86	Whisky	Litre	4·80 + 70%
87	Cocktails, cognac, brandy, absinthe and blackberry and ginger liquor and others	Litre	3·00
88	Rum in any container	Litre	1·50
89	Gin	Litre	2·00
90	Liqueurs, cordials and any other compound spirituous liquors not elsewhere specified	Litre	3·25 + 35%
91	Champagne and other sparkling wines	Litre	2·20 + 35%
92	Non-sparkling wines of all kinds, up to 17 degrees proof. *Note:* The excess of alcohol in non-sparkling wines will be taxed in accordance with the pure alcohol content, at the rate of 0·05 gold pesos for each degree proof over 15 degrees and for each litre.		
93	Dentifrice in powder, soap, liquid, paste, solid, leaf or other forms	K.N.	1·00 + 40%
94	Soaps: (a) of coconut oil, cottonseed oil, olive oil and similar soaps, including castille, unscented, in paste form	K.G.	0·20 + 35%
	(b) the same, in flake, powder or other forms, unscented	K.G.	0·10 + 35%
	(c) toilet and shaving soap	K.N.	0·75 + 35%
	(d) patent medicated soap	K.N.	0·05 + 35%
95	Scouring and washing preparatons not elsewhere specified, other than soap	K.G.	0·25 + 45%
	Bases for detergents or semi-manufactured detergents imported by industry for mixing with other substances and preparations for sale to the consumer, provided that such products are not introduced packed ready for retail sale and are covered by a certificate from the Secretary of State for Industry and Commerce	K.G.	0·025 + 35%
96	Toilet powders, rice, talcum or magnesium powders and powders made with other substances, also face powders, whether or not with medicated ingredients, scented, but not compressed	K.N.	1·50 + 45%
97	Extracts, essences and perfumes, in any form for the handkerchief and similar uses	K.G.	3·00 + 35%
98	Waters and lotions for the toilet and bath, lotions and tonics for the hair and other similar products, toilet vinegars and aromatic salts	K.N.	2·00 + 35%
99	Face paints, eyebrow and eyelash pencils, compressed powders, lipstick and rouge, depilatory preparations, nail polishing and colouring preparations and cosmetics in general	K.N.	3·00 + 35%

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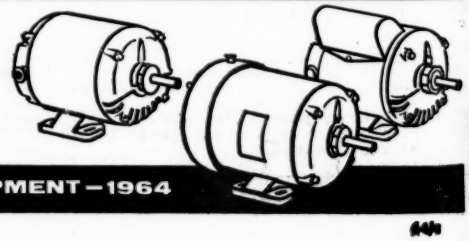
1904—SIXTY YEARS OF ELECTRIC MOTOR DEVELOPMENT—1964

DOMINICAN REPUBLIC, *continued*

No.	Description	Unit	Tax Rate: Gold Pesos and/or *ad valorem*
100	Pomades in any form and of any kind for the moustache, beard or the hair	K.N.	2·00 + 35%
101	Bay rum and alcohol	Litre	0·85 + 35%
102	Paraffin and other mineral waxes, manufactured as candles, tapers and similar articles	K.N.	0·07 + 35%
103	Other imported articles not included in the preceding paragraphs except those exempted under article 3 of law 173 of March 9, 1964		50%

MEXICO

Customs tariff changes

THE MEXICAN *Diario Oficial* published a Decree on May 7, 1964, and effective five days thereafter, changing various Tariff Headings which are now as follows:

Tariff No.	Description	Unit	Duty: Pesos	Duty: *Ad val.*
220.00.00	*Deleted.*			
220.00.02	*Deleted.*			
220.00.03	*Deleted.*			
220.00.04	*Deleted.*			
220.00.05	*Deleted.*			
220.00.06	*Deleted.*			
220.00.07	*Deleted.*			
220.00.08	*Deleted.*			
220.00.09	*Deleted.*			
220.00.10	*Deleted.*			
220.00.11	*Deleted.*			
220.00.12	Artificial raw rubber based on oxidized or vulcanized oils known as factice, without lamp black	G.K.	0·12	+10%
220.00.13	Natural rubber in latex form, whether or not with preserving additives, without charges, modifiers, pigments or lamp black	G.K.	0·05	+12%
220.00.14	Natural rubber in latex form, of the butadiene acrylonitrile type, whether or not with preserving additives, without charges, modifiers, pigments or lamp black	G.K.	0·30	+ 4%
220.00.15	Synthetic rubber in latex form, of the styrene butadiene type, with 55% maximum contents of styrene, whether or not with preserving additives, without charges, modifiers, pigments or lamp black	G.K.	0·30	+ 4%
	For LAFTA member countries	G.K.	Exempt	Exempt
220.00.16	Synthetic rubber in latex form, of isobutylene type, whether or not with preserving additives, without charges, modifiers, pigments or lamp black	G.K.	0·30	+ 4%
220.00.17	Synthetic rubber in latex form, of the polysoprene type, whether or not with preserving additives, without charges, modifiers, pigments or lamp black	G.K.	0·30	+ 4%
220.00.18	Synthetic rubber in latex form, of the polybutadiene type, whether or not with preserving additives, without charges, modifiers, pigments or lamp black	G.K.	0·30	+ 4%
220.00.19	Synthetic rubber in latex form of the polysulphides type (thioplasts) whether or not with preserving additives, without charges, modifiers, pigments or lamp black	G.K.	0·30	+ 4%
220.00.20	Synthetic rubber in latex form, of the chlorobutadiene (neoprene) type, whether or not with preserving additives, without charges, modifiers, pigments or lamp black	G.K.	0·30	+ 4%
220.00.21	Natural raw rubber, solid, of the pale crepe types, in sheets of irregular thickness or in bales, without charges, modifiers, pigments or lamp black	G.K.	0·30	+ 4%
220.00.22	Natural raw rubber, solid, smoked, in the form of striated sheets of irregular thickness or in bales, without charges, modifiers, pigments or lamp black	G.K.	0·30	+ 5%
220.00.23	Natural raw rubber, solid, of the brown crepe types, in the form of striated sheets of irregular thickness or in bales, without charges, modifiers, pigments or lamp black	G.K.	0·30	+ 5%
220.00.24	Natural rubber, solid, of the 'macaranduba' type, whether or not with preserving additives, without charges, modifiers, pigments or lamp black	G.K.	0·45	+20%
	For LAFTA member countries	G.K.	Exempt	+ 7%
220.00.25	Synthetic rubber, solid, of the butadiene acrylonitrile type, whether or not with preserving additives, without charges, modifiers, pigments or lamp black	G.K.	0·30	+ 4%
220.00.26	Synthetic rubber, solid, of the styrene butadiene type, with 55% maximum contents of styrene, whether or not with preserving additives, without charges, modifiers, pigments, lamp black, if oil-extended	G.K.	0·30	+ 4%
	For LAFTA member countries	G.K.	Exempt	Exempt
220.00.27	Synthetic rubber, solid, of the styrene butadiene type, with 55% maximum contents of styrene, whether or not with preserving additives. without charges, modifiers, pigments, lamp black, if not oil-extended	G.K.	0·30	+ 4%
	For LAFTA member countries	G.K.	Exempt	Exempt
220.00.28	Synthetic rubber, solid, of the isobutilene type, whether or not with preserving additives, without charges, modifiers, pigments or lamp black	G.K.	0·30	+ 4%
220.00.29	Synthetic rubber, solid, of the polyethylene chlorosulphonated type, whether or not with preserving additives, without charges, modifiers, pigments or lamp black	G.K.	0·30	+ 4%
220.00.30	Synthetic rubber, solid, of the stylene propylene type, whether or not with preserving additives, without charges, modifiers, pigments or lamp black	G.K.	0·30	+ 4%
220.00.31	Synthetic rubber, solid, of the fluorocarbides type, whether or not with preserving additives, without charges, modifiers, pigments or lamp black	G.K.	0·30	+ 4%
220.00.32	Synthetic rubber, solid, of the polyisoprene type, whether or not with preserving additives, without charges, modifiers, pigments, or lamp black, if oil-extended	G.K.	0·35	+ 5%
220.00.33	Synthetic rubber, solid, of the polyisoprene type, whether or not with preserving additives, without charges, modifiers, pigments or lamp black, if not oil-extended	G.K.	0·30	+ 5%
220.00.34	Synthetic rubber, solid, of the chlorobutadiene type (neoprene), whether or not with preserving additives, without charges, modifiers, pigments or lamp black	G.K.	0·30	+ 4%
220.00.35	Synthetic rubber, solid, of the polyacrylates type, whether or not with preserving additives, without charges, modifiers, pigments or lamp black	G.K.	0·30	+ 4%
220.00.36	Synthetic rubber, solid, of the polybutadiene type, whether or not with preserving additives, without charges, modifiers, pigments or lamp black, if oil-extended	G.K.	0·35	+ 5%
220.00.37	Synthetic rubber, solid, of the polybutadiene type, whether or not with preserving additives, without charges, modifiers, pigments or lamp black, if not oil-extended	G.K.	0·30	+ 5%
220.00.38	Synthetic rubber, solid or liquid, of the polysulphides type (thioplasts) whether or not with preserving additives, without charges, modifiers, pigments or lamp black	G.K.	0·30	+ 4%
220.00.39	Synthetic rubber, solid, of the silicones type, whether or not with preserving additives, without charges, modifiers, pigments or lamp black	G.K.	0·30	+ 4%
220.00.40	Synthetic rubber, solid of the polysocianates type (polyurethanes), whether or not with preserving additives, without charges, modifiers, pigments or lamp black	G.K.	0·30	+ 4%
220.00.41	Synthetic rubber, solid, of the chloroisoprene type, (chlorated rubber), whether or not with preserving additives, without charges, modifiers, pigments or lamp black	G.K.	0·30	+ 4%
220.00.42	Synthetic or natural rubber, with one or several of the following materials: charges, modifiers, pigments or lamp black	G.K.	0·45	+20%
220.00.43	Reclaimed rubber, in sheets of irregular thickness	G.K.	7·00	+20%
220.00.96	Synthetic rubber in latex form, whether or not with preserving additives, without charges, modfiers, pigments or lamp black	G.K.	0·50	+17%
220.00.97	Natural raw rubber, solid, not specifically mentioned, in sheets of irregular thickness or in bales, without charges, modifiers, pigments or lamp black	G.K.	0·50	+17%
220.00.98	Synthetic rubber, solid, not specifically mentioned, whether or not with preserving additives, without charges, modifiers, pigments or lamp black, if oil-extended	G.K.	13·00	+20%

(*Continued on next page*)

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MEXICO, *continued*

Tariff No.	Description	Unit	Duty	
			Pesos	*Ad val.*
220.00.99	Synthetic rubber, solid, not specifically mentioned, whether or not with preserving additives, without charges, modifiers, pigments or lamp black, if not oil-extended	G.K.	13·00	+20%
302.06.05	Liquefied petroleum gas, in a propane butane mixture	Litre	Exempt	Exempt
500.06.13	Dibasic ammonium phosphate, chemically pure	G.K.	0·02	+ 7%
500.06.14	Dibasic ammonium phosphate, edible grade, with 18 to 20% phosphor	G.K.	0·02	+ 7%
500.06.15	Dibasic phosphate of technical ammonium	G.K.	0·02	+ 7%
500.06.16	Ammonium bifluoro (ammonium acid fluoride)	G.K.	0·05	+ 7%
500.08.05	Barium monohydrate hydroxide (technical grade, 98·2% pure)	G.K.	0·50	+15%
500.08.06	Barium sulphate, X-ray grade	G.K.	0·50	+15%
500.19.01	Phosphorus oxychloride (phosphoryl chloride)	G.K.	0·20	+10%
500.27.22	Potassium fluorsilicate (potassium silicofluoride; potassium fluorosilicate)	G.K.	0·15	+20%
500.30.06	*Deleted.*			
500.30.21	Anhydrous normal sodium pyrophosphate (anhydrous tetrasodic pyrophosphate)	G.K.	0·01	+10%
500.30.37	Anhydrous sodic tetraborate (borax) technical grade	G.K.	0·05	+ 5%
	For LAFTA member countries	G.K.	Exempt	+ 3%
500.30.38	Pentahydrated sodium tetraborate, (borax) technical grade	G.K.	0·05	+ 5%
	For LAFTA member countries	G.K.	Exempt	+ 3%
500.30.39	Sodium tetraborate (decahydrated borax), technical grade	G.K.	0·05	+ 5%
	For LAFTA member countries	G.K.	Exempt	+ 3%
500.30.40	Sodium bisulfite (per 100 kgs.)	G.K.	0·05	+ 3%
500.30.41	Sodium methabisulfite (sodium pyrosulfite), (per 100 kilogs)	G.K.	0·05	+ 3%
500.30.42	Sodium bisulphate (sodium sulphate acid)	G.K.	0·09	+10%
501.00.11	*Deleted.*			
501.00.88	Dichloroisocyanuric acid (dichlorosym triasinatrione)	L.K.	0·20	+22%
501.00.89	Trichloroisocyanuric acid (1-3-5-trichloro-cistriacine 2-4-6-triona)	L.K.	0·20	+22%
501.07.38	Glutamic acid Phatalilimide		Prohibited	
501.07.76	Tilia cinnamate (ethyl phenyl acrylate: cinnamic ester: cinnamilic ether)	L.K.	0·80	+12%
501.07.77	Ethyl caprylate (ethyl octoate)	L.K.	0·80	+12%
501.07.78	Etylene glycol monobutylic ether (butyldigol)	L.K.	0·50	+10%
501.07.79	Diethylene glycol monomethylic ether (methyldigol)	L.K.	0·50	+10%
501.07.80	Diethyleneglycol mono phenylic ether (phenyldygol)	L.K.	0·50	+10%
501.07.81	Ethyl bromide (bromoethane)	L.K.	0·20	+22%
501.07.82	Tridecyl phosphite	L.K.	0·80	+12%
501.07.83	Triphenyl phosphate	L.K.	0·80	+12%
501.07.84	Dibutyl sebacate	L.K.	0·80	+12%
501.07.85	Butyl stearate	L.K.	0·80	+12%
501.11.08	Ethylene trichloride (trichloroethylene)	G.K.	0·01	+ 7%
501.11.13	Tetrachloroethylene (perchloroethylene)	G.K.	0·01	+ 7%
501.30.55	Potassium dichloro isocyanate	L.K.	0·20	+22%
501.30.56	Aluminium isopropoxide (aluminium isopropilate)	L.K.	1·00	+12%
501.30.57	Zinc octoate (Zinc 2-ethyl hexanoate)	L.K.	0·50	+10%
501.30.58	Sodium trichloro acetate	L.K.	0·10	+ 7%
501.30.59	Lead Dibasic phtalate	L.K.	0·20	+35%
501.30.60	Lead Dibasic phosphite	G.K.	0·20	+35%
501.30.61	Ammonium methavanadate (ammonium vanadate)	G.K.	0·40	+45%
501.30.62	Zirconium oxychloride (zirconium basic chloride: zirconyl chloride)	G.K.	0·40	+45%
	Heading 501.32 – Other salts of organic origin and products derived from cellulose.			
501.32.00	Standard methyl cellulose	L.K.	0·10	+ 6%
501.32.01	Special methyl cellulose	L.K.	0·10	+ 6%
501.32.02	Ethyl cellulose, solid	L.K.	0·10	+ 6%
501.32.03	Hydroxiethyl cellulose	L.K.	0·10	+ 5%
	Heading 501.32 – Acids and anhydrides, organic. (The acid anhydrides will be considered as such according to kind).			
501.33.00	Crotonic acid and its isomers (butenoic acid; beta metracylic)	L.K.	0·40	+40%
501.33.01	Hydroxystearic acid, (12-hydroxystearic)	L.K.	0·40	+40%
501.33.02	Capric acid (decanoic: decylic)	L.K.	0·40	+40%
501.33.03	Lactic acid, technical grade (not edible), of 44% maximum pure	L.K.	0·05	+12%
	For LAFTA member countries	L.K.	Exempt	+ 8%
501.33.04	Lactic acid, plastic grade (not edible), 50 to 80% pure	L.K.	0·05	+12%
	For LAFTA member countries	L.K.	Exempt	+ 8%
501.33.05	Lactic acid, edible grade, 50 to 80% pure	L.K.	0·05	+12%
	For LAFTA member countries	L.K.	Exempt	+ 8%
501.33.06	Lactic acid, pharmaceutical grade, 85% minimum pure	L.K.	0·05	+12%
	For LAFTA member countries	L.K.	Exempt	+ 8%
501.33.07	Cinnamic acid (beta phenylacrylic: cinnamylic)	L.K.	0·30	+40%
501.33.08	Ethyl butoxy propionic acid	L.K.	0·30	+40%
501.33.09	Isodecanoic acid	L.K.	0·30	+40%
501.33.10	Acrylic acid. (Acroleic; ethylene carboxylic; vynil formic; propenic)	L.K.	0·50	+32%
501.33.11	Propionic acid (methyl acetic acid, meta-acetonic acid; ethyl carbonic acid)	L.K.	0·30	+40%
501.33.12	Myristic acid (tetra decanoic)	G.K.	0·40	+40%
501.33.13	Behenic acid (decosanoic)	G.K.	0·40	+40%
501.33.17	2-4 dichloro phenoxyacetic acid (2-4-D)	L.K.	0·20	+17%
540.00.60	Benzoic aldehyde (Benzaldehyde; benzoic hydride; benzene carbonal)	L.K.	3·00	+31%
570.00.27	Ion exchange resins	L.K.	0·10	+15%
570.00.28	Polyester resins, not saturated, solid	L.K.	0·10	+ 6%
570.00.29	Nylon, solid, for moulding and extrusion	L.K.	25·00	+40%
593.02.75	2-2 thiobis-(4-6-dichlorophenol)	L.K.	0·50	+10%
593.02.76	Para-tert-butylphenol	L.K.	0·50	+10%
593.02.77	Sucrose octa acetate	L.K.	0·50	+10%
593.02.78	2-Nitro-2 methyl-1-propanol	L.K.	0·50	+10%
593.02.79	2-mercaptbenzimidazol	L.K.	0·50	+10%
593.02.80	2-hydroxy-4-methoxybenzophenone	L.K.	0·50	+10%
593.02.81	Butilated hydroanisole (BHA)	L.K.	0·50	+10%
593.02.82	Glyoxal, 30% (diformyl)	L.K.	0·50	+10%
593.02.83	Trimethyl phosphite	L.K.	0·50	+10%
593.02.84	2-2-Dihydroxy-dimethoxy-4-benzophenone	L.K.	0·50	+10%
593.02.85	2-6 Diterbutyl 4 methylphenol (butilated hydroxytoluene)	L.K.	0·50	+10%
593.02.86	Diphenyl guanidine (D.P.G.: melaniline)	L.K.	0·50	+10%
593.02.87	2-amino-2-ethyl-1-3-propanediol (aminoaminel glycol)	L.K.	0·50	+10%
593.02.88	Caproyl chloride (octanoile chloride)	L.K.	0·50	+10%
593.02.89	2-Didimethylamine-2 methyl-1-propanol	L.K.	0·50	+10%
	Heading 593.10 – Other mixtures, preparations and products not specified.			
593.10.00	Bromosuccinimide, normal	L.K.	0·50	+10%
593.10.01	2-amino-2-methyl-1-3-propanediol (AMPO: aminobutylene glycol; butenodiul amine)	L.K.	0·50	+10%
593.10.02	2-amino-1-butanol	L.K.	0·50	+10%
593.10.03	2-nitro-1-butanol	L.K.	0·50	+10%
593.10.04	2-nitro-2-ethyl-1-3-propanediol	L.K.	0·30	+ 8%
593.10.05	Para amylphenol	L.K.	0·30	+ 8%
593.10.06	2-amino-methyl-propanol (amino iso butanol)	L.K.	0·50	+10%
593.10.07	Dicyclohexylamine	L.K.	0·50	+10%
593.10.08	Propyl mercaptane (propanothiol; propyl sulphihydrate)	L.K.	0·50	+10%
593.10.09	Polyvynilic alcohols, solid, with a maximum of 40% of acetyl groups	L.K.	0·50	+10%
593.10.10	Normal octyl mercaptane	L.K.	0·50	+10%
593.10.11	Dodecyl mercaptane (laurylic mercaptane)	L.K.	0·50	+10%
593.10.12	Butyl mercaptano and its isomers, (1-butanothiol; iterbutanothiol	G.K.	0·50	+10%
593.10.13	Ethyl mercaptano (tilia sulphihydrate; ethanothiol)	L.K.	0·50	+10%
593.10.14	Methyl mercaptane (methylthiol; methyl sulphihydrate)	G.K.	0·50	+10%
593.10.15	Dodecylic mercaptane and its isomers (lauryl mercaptane; tertdodecyl mercaptane; normal dodecyl mercaptane)	G.K.	0·50	+10%
593.10.16	Chlorated paraffin containing more than 40% and up to 70% of chloride (chlorocoxane; Dakin's oil)	G.K.	0·50	+10%
593.10.17	Chlorated paraffin containing more than 70% chloride (chlorocoxane, Dakin's oil)	G.K.	0·50	+10%
593.10.18	Methyl normal 2-pyrrolidone	G.K.	0·50	+10%
593.10.19	Dimethyl terephtalate	L.K.	0·50	+10%
593.10.20	Vynil normal-2-pyrrolidone	L.K.	0·50	+10%
593.10.21	Hydroxylamine acid sulphate (Hydroxy-ammonium sulphate)	L.K.	0·50	+10%
593.10.22	Dihydroxy diphenyl methane (dichlorophen; 2-2 dihydroxy 5-5 dichloro phenyl methane; 2-2 methylene bis (4-chlorophenol); bis (5-chloro-2-hydroxyphenyl) (methane)	L.K.	0·30	+ 8%
593.10.23	Technical acrylamide, 97% pure	L.K.	0·30	+ 8%
593.10.24	Hydroxylamine sulphate (hydroxyammonium sulphate)	L.K.	0·50	+10%
593.10.25	Cyanoguanidine (dicyandiamidine)	L.K.	0·50	+10%
593.10.26	Octadecenamide (oleamide)	L.K.	0·50	+10%
593.10.27	Furfuryl alcohol	L.K.	0·20	+ 7%
593.10.28	1-2 dihydro-2-2-4 trimethyl quinoline	L.K.	0·25	+ 7%
593.10.29	2-2 methylene bis (4-methyl-6-alphamethyl cyclohexylphenol)	L.K.	0·25	+ 7%
593.10.30	Dipentamethylene thiuram tetrasulphide	L.K.	0·25	+ 7%
593.10.31	2-nitro-2-methyl-1-3-propanediol	L.K.	0·50	+10%
593.10.32	Trichloroethane and its isomers, (methyl chloroform; -1-1-1 trichloroethane, 1-1-2 trichloro; vynil trichloride, beta trichloroethane)	L.K.	0·05	+ 5%
593.10.33	Styrene-vynil copolymers, solid	L.K.	0·30	+ 4%
593.10.34	Styrene-maleic copolymers, solid	L.K.	0·30	+ 4%
593.10.35	Chlorobutadiene 1-3. monomer, 95% minimum	L.K.	0·30	+ 4%
593.10.36	Triethylene dicaprylate glycol (triethylene glycol dioctate)	L.K.	0·55	+15%
634.01.10	Kraft paper sacks, bags of three or four layers of which the outside one will be black in colour, provided with a valve and bottoms glued and a pleat of not less than printed characters	L.K.	0·10	+18%
635.12.00	Books printed in any language except Spanish, paperbound	L.K.	Exempt	Exempt
635.12.01	Books printed in any language except Spanish, with paperboard, leather or percaline bindings	L.K.	Exempt	Exempt
	For LAFTA member countries	L.K.	Exempt	Exempt

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ARGENTINA

'Aforos' for imports

ARGENTINE CUSTOMS Administration Resolutions Nos. 277 and 278 of May 12, 1964, Nos. 297 and 298 of May 19, 1964, Nos. 333, 334, 335, 336 and 337 of June 10, 1964, and Ministry of Economy Resolution No. 1040 of May 12, 1964, establish the following index prices ('aforos' – average valuations) on which surcharges and duties in respect of the following items will be assessed:

Tariff No.	Item	Value U.S. Dollars (C. & F.)	Appraisement Unit
	Resolution No. 277		
Without Tariff No.	Glass bulb for cathode ray tubes, of 0·5842 m. (23 in.), 110 degrees and 0·5842 m. (23 in.) 114 degrees (Brussels Nomenclature Section XVI – 85.21)	10·16	Each
Without Tariff No.	Electronic cannon for cathode ray tubes, of 110 up to 114 degrees, with electroscopic focusing, short or large neck, for 6·3V.-0·6A., 6·3V.-0·45 A. and 6·3V.-03A (Brussels Nomenclature Section XVI – 85.21)	1·45	Each
	Resolution No. 278		
*4658	Kaolin for industry in stone or lump form (Brussels Nomenclature Section V – 25.07)	40·00	1,000 kilos net
*4658	Kaolin for industry, ground (Brussels Nomenclature Section V – 25.07)	100·00	100 kilos net
	Resolution No. 297		
1799	Rolled and pressed corrugated iron or steel sheets for the manufacture of corrugated fibre-cement sheets (Brussels Nomenclature Section XVI – 84.48)	0·45	Kilo net

Resolution No. 333

*In view of representations made by the Argentine Federation for the Rubber Industry and the Paper Manufacturers' Association, these prices are being reviewed and for the time being will remain pending.

	Resolution No. 298		
1739	Okume (Acecoumea Klainlana Piene) (BN Section IX – 44.03)	130·00	1,000 kilos gross
1739	Oak (Quercus) (BN Section IX – 44.03)	180·00	1,000 kilos gross
1739	Mahogany (Etandrophsagma) (BN Section IX – 44.03)	125·00	1,000 kilos gross
1739	European and/or American walnut (Juglans Regia Lin) (BN Section IX – 44.03)	300·00	1,000 kilos gross
1739	Makore (Mimusops) (BN Section IX – 44.03)	120·00	1,000 kilos gross
1739	Avodire (Turreanthus Africana Pellegrin) (BN Section IX – 44.03)	180·00	1,000 kilos gross
1739	Zebrano (Microberlinia Brazzavillensi A. Cheo) (BN Section IX – 44.03)	140·00	1,000 kilos gross
1739	Birch (Betula Alba) (BN Section IX – 44.03)	110·00	1,000 kilos gross
1739	Bubinga (Copaifera) (BN Section IX – 44.03)	120·00	1,000 kilos gross
Without Tariff No.	Wood roots (BN Section IX – 44.03)	400·00	1,000 kilos gross
1739	Sycamore (Acer Pseudoplatanus Lin) (BN Section IX – 44.03)	260·00	1,000 kilos gross
1739	Imbuya (Phoebe Porosa) (BN Section IX – 44.03)	310·00	1,000 kilos gross
1739	Palisandro (Bignoniacea Dalbergia Nigra) (BN Section IX – 44.03)	400·00	1,000 kilos gross
1739	Jacaranda (Bignoniacea) (BN Section IX – 44.03)	400·00	1,000 kilos gross
1739	Peteriby (Cordia Frichetorna) (BN Section IX – 44.03)	96·00	1,000 kilos gross
1739	Louro (Cordia Frichetorna) (BN Section IX – 44.03)	96·00	1,000 kilos gross
1739	Kossipo (Entandrophsagna) (BN Section IX – 44.03)	120·00	1,000 kilos gross
1739	Trebol (Amburana Cearensis Legum) (BN Secton IX – 44.03)	96·00	1,000 kilos gross
1739	Cerejeira (Amburana Cearensis Legum) (BN Section IX – 44.03)	96·00	1,000 kilos gross
	Resolution No. 334		
4858	Sodium sulphide (BN 28.35)	160·00	1,000 kilos net
	Resolution No. 335		
4468	Cocaine (BN 29.42)	572·31	Net kilo
4468	Cocaine hydrochloride (BN 29.42)	481·48	Net kilo
4470	Codeine, pure (BN29.42)	367·01	Net kilo
4470	Codeine hydrochloride (BN 29.42)	323·28	Net kilo
4470	Codeine phosphate (BN 29.42)	282·00	Net kilo
4470	Codeine sulphate (BN 29.42)	305·64	Net kilo
4280	Dihydrocodeinone hydrogen tartrate (BN 29.42)	881·85	Net kilo
4280	Ethylmorphine (BN 29.42)	311·12	Net kilo
4280	Ethylmorphine hydrochloride (BN 29.42)	342·33	Net kilo
4706	Morphine acetate (BN 29.42)	246·91	Net kilo
4706	Morphine hydrobromide (BN 29.42)	349·21	Net kilo
4706	Morphine hydrochloride (BN 29.42)	298·06	Net kilo
4706	Morphine phosphate (BN 29.42)	349·21	Net kilo
4706	Morphine, pure (BN 29.42)	368·31	Net kilo
4706	Morphine sulphate (BN 29.42)	298·06	Net kilo
4706	Morphine tartrate (BN 29.42)	296·30	Net kilo
4280	Morpholinylethylmorphine (BN 29.42)	473·00	Net kilo
1372	*Resolution No.* 336 Steel pipes and tubes, hot-rolled. Nominal size ⅛, external diameter 10·2 mm., thickness 2·0-2·65 mm.	384·00	1,000 kilos net
1372	Steel pipes and tubes, hot-rolled. Nominal size ¼, external diameter 13·5 mm., thicknesses 2-2·35-2·9 mm.	264·00	1,000 kilos net
1372	Steel pipes and tubes, hot-rolled. Nominal size ⅜, external diameter 17·5 mm., thicknesses 2-2·35-2·9 mm.	264·00	1,000 kilos net
1372	Steel pipes and tubes, hot-rolled. Nominal size ½, external diameter 21·3 mm., thicknesses 2·35-2·65-3·25 mm.	212·00	1,000 kilos net
1372	Steel pipes and tubes, hot-rolled. Nominal size ¾, external diameter 26·9 mm., thicknesses 2·35-2·65-3·25 mm.	212·00	1,000 kilos net
1372	Steel pipes and tubes, hot-rolled. Nominal size 1, external diameter 33·7 mm., thicknesses 2·9-3·25-4·05 mm.	180·00	1,000 kilos net
1372	Steel pipes and tubes, hot-rolled. Nominal size 1¼, external diameter 42·4 mm., thicknesses 2·9-3·25-4·05 mm.	180·00	1,000 kilos net
1372	Steel pipes and tubes, hot-rolled. Nominal size 1½, external diameter 48·3 mm., thicknesses 2·9-3·25-4·05 mm.	180·00	1,000 kilos net
1372	Steel pipes and tubes, hot-rolled. Nominal size 2, external diameter 60·3 mm., thicknesses 3·25-3·65-4·50 mm.	180·00	1,000 kilos net
1372	Steel pipes and tubes, hot-rolled. Nominal size 2½, external diameter 76·1 mm., thicknesses 3·25-3·65-4·50 mm.	180·00	1,000 kilos net
1372	Steel pipes and tubes, hot-rolled. Nominal size 3, external diameter 88·9 mm., thicknesses 3·65-4·05-4·85 mm.	180·00	1,000 kilos net
1372	Steel pipes and tubes, hot-rolled. Nominal size 3½, external diameter 101·6 mm., thicknesses 3·65-4·05-4·85 mm.	180·00	1,000 kilos net
1372	Steel pipes and tubes, hot-rolled. Nominal size 4, external diameter 114·3 mm., thicknesses 4·05-4·50-5·40 mm.	180·00	1,000 kilos net
1372	Steel pipes and tubes, hot-rolled. Nominal size 5, external diameter 139·7 mm., thickness 4·85-5·40 mm.	180·00	1,000 kilos net
1372	Steel pipes and tubes, hot-rolled. Nominal size 6, external diameter 165·1 mm., thickness 4·85-5·40 mm.	180·00	1,000 kilos net
1372	Steel pipes and tubes, cold-rolled or drawn, or precision pipes and tubes. External diameter up to 8 mm.	1,040·00	1,000 kilos net
1372	Steel pipes and tubes, cold-rolled or drawn, or precision pipes and tubes. External diameter greater than 8 mm. up to 10 mm.	616·00	1,000 kilos net
1372	Steel pipes and tubes, cold-rolled or drawn, or precision pipes and tubes. External diameter greater than 10 mm. up to 15·8 mm.	536·00	1,000 kilos net
1372	Steel pipes and tubes, cold-rolled or drawn, or precision pipes and tubes. External diameter greater than 15·8 mm. up to 22.2 mm.	376·00	1,000 kilos net
1372	Steel pipes and tubes, cold-rolled or drawn, or precision pipes and tubes. External diameter greater than 22·2 mm.	336·00	1,000 kilos net
	Resolution No. 337		
4271	'Anhidrido Italico' (phthalic anhydride (?)) (BN VI – 29.15)	270·00	1,000 kilos net
	Resolution No. 1040		
4744 bis	Discs of polyester resin	3·00	Per kilo
4744 bis	Buttons of polyester resin	6·00	Per kilo

Imports of omnibus chassis parts and drugs

H.M. EMBASSY at Buenos Aires report the publication of Argentine Government Decree No. 3799 of May 27, 1964, which reduces the surcharge on imported omnibus chassis parts destined exclusively for the assembly of passenger omnibuses. Sub-paragraph (c) of Article 3 of Decree No. 14719/60, referred to in Decree No. 7703/61 (see the *Board of Trade Journal* of October 20, 1961, page 842), is modified to read as follows:

'(c) New chassis, and parts or new elements exclusively destined in assembling chassis especially designed for passenger omnibuses of a

(*continued on next page*)

ARGENTINA, *continued*

maximum permissible gross weight of not less than 13 tons and whose distance between axles is not more than 5·45 metres – 40 per cent surcharge.'

Argentine Government Decree No. 3383 of May 11, 1964, announces that the drugs mentioned in Article 1 of Decree No. 8221 of September 30, 1963 (see the *Board of Trade Journal* of November 8, 1963, page 1052) are exempt from the payment of all taxes, import duties or import surcharges – the previous decree stated that the drugs were exempt from import duties and taxes only.

Modifications to import lists

ARGENTINE GOVERNMENT Decree No. 2707 of April 16, 1964, and Nos. 2809, 2810 and 2811 of April 21, 1964, add the following items to the lists attached to Decree No. 5439/59:

Tariff No.	Item	List
	Decree 2707	
4.882	A blue liquid soluble in water and of characteristic colour, made up of an aqueous solution of an alkylene-urea, an artificial organic pigment and a small quantity of butyric acid	5
4.400	Clear liquid, of a yellowish colour and characteristic odour, made up of an aqueous solution of 6% lactic acid and 34% calcium chloride	5
4.368	Liquid of violet-red colour and characteristic odour, made up of a solution in acetic esters of a thermoplastic synthetic material (polyvinyl chloride) and a small quantity of a colour aniline which, spread over a smooth surface and dried in the air, leaves a shiny, adhesive and translucent film, with the characteristics of spirit varnish	5
4.556	White powder, of a characteristic colour (sic) with the characteristics of glycerol stearates (glycerol monostearate and distearate) ('Tegomul M')	5
4.672	Bactericide solution for cleaning and disinfecting the home ('Pine Sol')	5
4.315	Paste with the characteristics of the acetic salt of a fatty amine ('Duomac T')	5
2.272	Insulating tape made up of a thermoplastic synthetic material (Polyvinyl chloride) and an adhesive	5
4.744 bis	Product made mainly of a synthetic material ('Proteinoplast') and an inorganic pigment forming a paste with aromatic hydrocarbons	5
4.556	White paste made from an ester of a fatty acid, a small quantity of a sulphated oil and water. ('Siotol N.C.')	5
2.774	Cylindrical pieces, approximately 3 mm. in diameter, made of sodium silicoaluminate: 'Molicular Sieves (Type 4-A 8 x 12')	5
4.303	Powder made of aluminium oxide (82·9%), loss through calcination (17·0%) being mainly water	5
4.356	Granulated solid made of a phenol-formaldehyde resin modified with resin and a small quantity of hexamine	5
4.356	Phenolic resin modified with coumarone	5
4.852	Powder made up of sodium carbonate (59·15%), sodium phosphate (26·1%) and a cationic reagent with characteristics of a quaternary ammonium chloride ('Pastaurite')	5
4.846	Powder made up of sodium phosphate (40·2%) and sodium carbonate (35%) and an anionic surface-active product ('C.L.X.')	5
4.480	'Carophyll 10', a dispersion of a carotenoid substance in a base of geletins, sugar and fecula (ethyl β-apo-8 carotenate)	5
4.697	Solid product with physical and chemical properties of a mixture of isomers of menthol ('Mentholon')	5
	Decree 2809	
4.556	A white mass, greasy to the touch, made up of glycerol monostearate for industrial use ('GMS 33')	5
4.556	Glycerol monostearate	5
4.280	A cattle feed supplement which, when analysed, was found to contain stilboestrol, starch and proteins ('Stilbozol')	5
5.106/7	Tubes of 'Pyrex' glass (special borosilicate), for 'retemetros'(?), plain or graduated	5
4.271	Calcium bromide lactobionate ('Calcibrom', or 'Calcibsonet' or 'Brocalcin')	5
4.556	Synthetic triglyceride made up of glycerol tripalmitat (20%), glycerol trioleate (30%), glycerol tristearate (30%) and glycerol trilinoleate (20%) ('Triglyceride N. C. 9246 Special')	5
4.231	Contact lenses, semi-finished and/or finished, of methyl polymethacrylate	5
3.921	Plastic film of polyester of terephthalic acid with a covering of a printing substance made from lampblack and a mineral filler (mainly calcium and magnesium phosphates and carbonates) for engraving in colour on pieces of plastic material	5
4.744 bis	Plate made of a support made from agglomerated vegetable waste with a coating of a synthetic thermoplastic material of the polyurethane type stuck on one side	5
231	Plant pots or stands of plastic material containing miscellaneous seeds in an appropriate fertile medium	5
2.272	Product consisting of a support of glass cloth (11%) covered on both sides with a mineral fat (76%) and kaolin (13%)	5
117	Mangoes, semi-processed, with salt added for preserving them	5
4.844	*N*-4-Hydroxyethyl-1-piperazinomethyl tetracyline ('Amberavena')	5
4.229	Rods made of cellulose fibres (wood)	5
89	Palmettos, preserved	5
4.071	White sheet, regularly hollowed out, made up of cellulose acetate and a mineral filler (titanium dioxide). 'Cellulose acetate in small plates'	5
4.397	Powder made up of 98·6% calcium carbonate. ('Integram Grade 1A')	5
	Decree 2810	
4.280	Hydrochlorothiazide	2
4.317	*NN*-Dimethylaniline	2
1.799/802	Electronic equipment for the ultrasonic cleaning of metal parts	3
4.271	Lauroyl chloride	2
4.262 bis	Product in pieces made up mainly of an orthoderivate of phenol ('Carolid F.C.M.')	3
4.242	Hydrogenous soya oil made up of glyceride esters of fatty acids C16 and C18, which does not fulfil the conditions required so as to be considered as an edible vegetable fat ('Hidrofol Glicerides 150 H')	3
4.470	Resinous complex resulting from a combination of dihydrocodeinone and phenyltoloxamine, both in the form of sulphonated resins with properties of ion exchange	5
4.280	Vitam D2 or 'Calciferol', dry, dispersable in water, 500,000 units per gram, with a vehicle made up of an edible vegetable oil, vegetable gum, sugar and starch, and an anti-oxydant made up of a mixture of butylated hydroxyanisole and butylated hydroxytoluene	2
4.280	Methoxamine hydrochloride	2
4.507	Hemicellulose	2
2.187	Plates for photoengraving made up of a metal sheet (alloy of 99·25% aluminium and 0·65% silicon) coated with an acrylic resin capable of photopolymerisation. ('Dycryl photopolymer printing plate')	3
4.280	4-Hydroxybenz-1:3-oxathiol-2-one	2
4.271	Powder made up of an aromatic amide (40%), an ester of an aromatic acid (32%), a surface-active agent represented by alkali alkyl sulphate (1%) and alkali sulphates (27%) ('Latyl A Vehicle')	4
4.543	Stearin, special, pure, vegetable, non-hydrogenous ('Kawex')	5
	Decree 2811	
3.614	Waste of a synthetic thermoplastic material (polyvinyl chloride). Cut fibre ('Fibravil 9')	5
4.744 bis	Powder with the characteristics of an acrylic polymer made up of methyl methacrylate and acrylate in equal portions by weight ('Mamma, Mamma Polymer')	2
1.385	Tubes, joints and bends of steel, with an inner lining of copper-lead	3
1.385	Tubes, joints and bends of steel with an inner lining of lead.	3

PERU

Import packaging regulations

IT HAS BEEN announced by H.M. Embassy in Lima that Supreme Resolution No. 82 – R of May 22, 1964, has given authority to the Ministry of Finance to authorize the use of metal crates known as 'Containers' or 'Lift-van' either for imports or exports or for transporting to private warehouses after inspection by the Customs.

The Superintendent General of Customs will issue for each of the above-mentioned systems the necessary regulations for qualitative and quantitative controls so as to safeguard the interests of the fiscal authorities.

Due to the fact that these metallic crates are not an integral part of the contents, and that they will not remain in the country, their weight will not be taken into consideration in appraising the duties.

Amendments to import tariff

ACCORDING TO THE Peruvian Journal *El Peruano* of May 30, 1964, Supreme Resolution No. 137 – H has altered the nomenclature and duties of Items 2831 and 2832 as follows:

Item	Description	*Ad val.* Duty	New Specific Duty (Soles per gross kilo)
2831	Platform scales (weighing machines), for weighing up to 2 tons	16·667%	15·00
2831-A	Platform scales (weighing machines), for weighing more than 2 tons	16·667%	0·75
2832	Counter scales, with platform, including those with scoops, non-automatic	16·667% + 13·5% GATT	18·00 + 1·20 GATT
2832-A	Counter scales, without platform, including baby weighers and bathroom weighing machines	16·677%	1·80

The above mentioned duties, which include the surcharges established by Law 12995, come into force 90 days after publication.

VENEZUELA

Customs duty amendments

THE BRITISH EMBASSY in Caracas reports that the Venezuelan Ministries of Finance and Development have published a resolution dated June 15, 1964 increasing the duty on certain items made from plastic materials as follows:

Item No.	Description	Duty in bolivars per kilo gross
831.02	Grips, wallets, purses, ladies' handbags, key-cases, tobacco pouches, card cases and other similar articles, of all kinds of materials, except of basketwork:	
831.02.03	Of plastic materials:	
831.02.03.1	Pocket toilet cases	10.00
831.02.03.4	Not specified	10.00

This resolution enters into force on July 3, 1964.

Customs tariff and import licence modifications

THE BRITISH EMBASSY in Caracas reports that the Venezuelan Ministries of Finance and Development have issued several resolutions amending the customs tariff on certain items and a resolution imposing import licence requirements on the import of light bulbs. These resolutions are set out below:

A resolution was published on June 8, 1964 imposing import licence restrictions on light bulbs as follows:

Item No.	Description	Duty in Bolivars per kg. gross
721.03.01.2	Incandescent bulbs from 15 to 100 watts for current of 100-220 volts with glass covering, spherical form with or without neck with screw socket with a diameter between 25 and 27 mm.	1·20

This resolution will not be applicable to those imports protected by consular invoices, of which the date of consular certification was either on or before the date of publication of this resolution.

A resolution was published on June 8, 1964, increasing the duty on laminates and plastic articles as follows:

599.01.03	Plastic fabrics, not woven (other than synthetic textile fibres and woven fabrics made with such fibres):	
599.01.03.1	Up to 300 gr.	8·00
599.01.03.2	More than 300 gr. per square metre	4·00
599.01.03.3	Suppressed (leather imitations)	
599.01.04.4 A	Semi-manufactured plastic materials with a basis of unwoven plastic cloth, with or without reinforcement	10·00
899.07.2	Tablecloths, curtains (including shower curtains) and other similar products, of plastic materials	10·00
899.07.02.1	Suppressed (imitations of leather, hide or skin).	
899.07.02.2	Suppressed (not specified).	

This resolution enters into force on July 3, 1964.

A resolution was published on June 8, 1964, increasing the duty on plastic and other buttons as follows:

899.05.01	Buttons of plastic materials	12·00
899.05.02	Buttons other, n.e.s.	12·00
899.05.05	Suppressed (of bone or horn).	
899.05.06	Suppressed (of leather, hide or skin and imitations thereof).	
899.05.08	Suppressed (of rubber including ebonite).	
899.05.08.1	Suppressed (of rubber).	
899.05.08.2	Suppressed (of ebonite).	
899.05.09	Suppressed (of glass).	
899.05.15	Suppressed (of faience).	
899.05.17	Suppressed (of vegetable materials).	

This resolution enters into force on July 6, 1964.

A resolution was published on June 8, 1964, increasing the duty on brushes and brooms as follows:

899.13.05	Brushes, n.e.s., of all kinds of materials except wire:	
899.13.05.2	Of hogs' bristles	4·00
899.13.05.3	Of twigs	3·00
899.13.05.5	Not specified	4·00
899.13.06	Brooms of all kinds of materials	4·00
899.13.06.1	Suppressed (of plastic materials).	
899.13.06.2	Suppressed (not specified).	

This resolution is effective from July 3, 1964.

A resolution was issued on June 8, 1964, increasing the duty on dolls as follows:

899.15.05	Dolls of all kinds:	
899.15.05.2	Not specified	6·00

This resolution is effective from July 3, 1964.

CHILE

Exchange regulations

FURTHER TO THE NOTICE published in the *Board of Trade Journal* of June 19, 1964, it has now been announced that the Executive Committee of the Central Bank have ruled (in Circular No. 373) that forward exchange contracts can be made for all goods which are covered by bills of lading dated up to 120 days prior to July 31, 1963.

ANGLO-PERUVIAN TRADE BULLETIN

A regular monthly printed commercial bulletin is now being produced under the joint auspices of H.M. Embassy and the Peruvian British Trade Centre (an outpost of the Western Hemisphere Exports Council). The bulletin is distributed free. Firms in Britain who may have interests in the Peruvian market are invited to advertise in this bulletin. Details, Embajada Britanica, Casilla BLC, Lima.

CANADA

'Made in Canada' ruling

THE FOLLOWING RULING has been made for Canadian Customs purposes:

Of 'a class or kind made in Canada':
Benzoyl peroxide.

(Ruling effective July 27, 1964).

The above information is contained in Canadian Department of National Revenue Memorandum D51-33-3 dated June 24, 1964.

JAMAICA

Customs tariff changes

THE BOARD OF TRADE have received copies of Resolutions which amend the Jamaica Customs Tariff as follows:

First Schedule – Customs Duty

(1) by the *deletion* of items 314-02, 412-01 to 412-05 (inclusive), 412-07.1 to 412-19.9 (inclusive), 851-09 and 899-11 and the *substitution* therefor of the following:

Tariff Item No.	Class or Description of Goods	Unit: For Classification	Unit: For Duty	Rate of Duty: Preferential Tariff	Rate of Duty: General Tariff
				£ s. d.	£ s. d.
	Gas, natural and manufactured:				
	Gas, manufactured:				
314-02.1	Butane and propane in liquid form	lb.	gal.	0 0 9	0 1 0
314-02.9	Other	lb.	value	10%	15%
412-01.1	Linseed oil (including boiled) which the Collector General is satisfied is imported for the purpose of manufacturing hydrogenated oils	lb.	100 lb.	0 2 1	0 4 2
412-01.9	Other	gal.	gal.	0 0 4½	0 0 6
412-02.1	Soyabean oil which the Collector General is satisfied is imported for the purpose of manufacturing hydrogenated oils	lb.	100 lb.	0 2 1	0 4 2
412-02.9	Other	gal.	gal.	0 2 0	0 3 0
412-03.1	Cotton seed oil, which the Collector General is satisfied is imported for the purpose of manufacturing hydrogenated oils	lb.	100 lb.	0 2 1	0 4 2
412-03.9	Other	gal.	gal.	0 2 0	0 3 0
412-04.1	Groundnut (peanut) oil which the Collector General is satisfied is imported for the purpose of manufacturing hydrogenated oils	lb.	100 lb.	0 2 1	0 4 2
412-04.9	Other	gal.	gal.	0 2 0	0 3 0
412-05.1	Olive oil, which the Collector General is satisfied is imported for the purpose of manufacturing hydrogenated oils	lb.	100 lb.	0 2 1	0 4 2
412-05.9	Other	gal.	gal.	0 2 0	0 3 0
	Coconut (copra) oil:				
412-07.1	Refined	gal.	gal.	0 2 0	0 3 0
412-07.2	Unrefined, which the Collector General is satisfied is imported for the purpose of manufacturing hydrogenated oils	lb.	100 lb.	0 2 1	0 4 2
412-07.9	Other	gal.	tons	6 10 0	9 15 0
412-08.1	Palm Kernel oil, which the Collector General is satisfied is imported for the purpose of manufacturing hydrogenated oils	lb.	100 lb.	0 2 1	0 4 2
412-08.9	Other	gal.	gal.	0 2 0	0 3 0
412-11.1	Castor oil, which the Collector General is satisfied is imported for the purpose of manufacturing hydrogenated oils	lb.	100 lb.	0 2 1	0 4 2
412-11.9	Other	gal.	gal.	0 2 0	0 3 0
412-12.1	Tung oil, which the Collector General is satisfied is imported for the purpose of manufacturing hydrogenated oils	lb.	100 lb.	0 2 1	0 4 2
412-12.9	Other	gal.	gal.	0 2 0	0 3 0
	Oils from seeds, nuts and kernels, n.e.s.:				
	Cohune nut oil:				

(Continued on next page)

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JAMAICA, *continued*

Tariff Item No.	Class or Description of Goods	Unit		Rate of Duty	
		For Classification	For Duty	Preferential Tariff	General Tariff
412-19.1	Refined	gal.	gal.	0 2 0	0 3 0
412-19.21	Unrefined, which the Collector General is satisfied is imported for the purpose of manufacturing hydrogenated oils	lb.	100 lb.	0 2 1	0 4 2
412-19.22	Other	gal.	tons	6 10 0	9 15 0
412-19.91	Other oils, from seeds, nuts and kernels, n.e.s., which the Collector General is satisfied are imported for the purpose of manufacturing hydrogenated oils	lb.	100 lb.	0 2 1	0 4 2
412-19.92	Other	gal.	gal.	0 2 0	0 3 0
	Footwear, n.e.s. (including gaiters, spats, leggings, puttees):				
851-09.1	For adults, boys and girls	pair	value	15% plus 4s. per pair	25% plus 7s. 6d per pair
851-09.2	For infants (sizes 0-6 and of a type which the Collector General is satisfied is not being manufactured locally)	pair	value	15%	25% plus 3s. 6d. per pair
851-09.3	For infants (other sizes)	pair	value	15% plus 4s. per pair	25% plus 7s. 6d. per pair
899-11.1	Tools made of plastics, n.e.s. (including tool-bodies, tool-handles and shoemakers' lasts)	lb.	value	Free	5%
899-11.9	Other articles made of plastics, n.e.s.	lb.	value	20%	30%

(2) by the *addition* to the notes at the head of Division 68 of the notes 4 and 5 as follows:

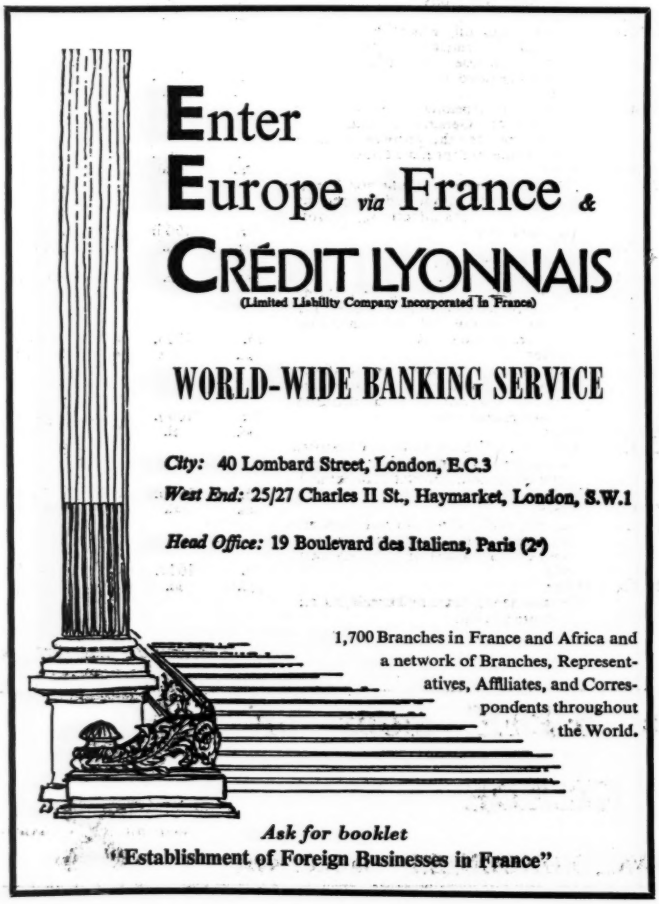
'4. Hoop and Strip (Item 681-06) means rolled products with sheared or unsheared edges, of rectangular section, of a thickness not exceeding six millimetres, of a width not exceeding five hundred millimetres, and of such dimensions that the thickness does not exceed one-tenth of the width, in straight strips, coils or flattened coils.

'5. Rolled products (other than coils for re-rolling – Item 681-03) of a thickness not exceeding one hundred and twenty-five millimetres and, if in rectangles, of a width exceeding five hundred millimetres, fall under Item 681-07. Item 681-07 is to be taken to apply *inter alia* to sheets or plates which have been cut to non-rectangular shape, perforated, corrugated, curved, channelled, ribbed, polished or coated.'

It should be noted that the above duties are also subject to a 10 per cent increase which was imposed under the recent Jamaica Budget (see *Board of Trade Journal* of May 8, 1964, page 1037).

Jamaica Customs Tariff (Matches) Resolution 1964, cancels the above-mentioned additional 10 per cent increase on any matches imported into the Island.

Inquiries about the above notice should be addressed to the Export Services Branch, Tariff Section, Board of Trade, Hillgate House, 35 Old Bailey, London, E.C.4. (Tel. City 5757, Ext. 471).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EUROPEAN ECONOMIC COMMUNITY

EEC-Israel trade agreement

A NOTE, published in the *Board of Trade Journal* of June 19, page 1347, referred to the reported signing of a trade agreement on June 4, in Brussels, between the European Economic Community and Israel. The *Journal Officiel des Communautés Européennes* dated June 13, contains the text of the agreement, valid for three years and renewable, which entered into force on July 1.

The agreement provides for temporary reductions of the Common Tariff rates for the following products and the immediate alignment on the reduced rates by E.E.C. Member States currently applying higher duties.

Tariff No.	Description of Goods	Duty
ex 08.01 E	Avocados	8·0%
08.02 D	Grapefruit	7·2%
ex 20.07 B II	Grapefruit juice (1)	17·1%
ex 28.40 B II	Calcium hydrogen orthophosphate containing less than 0·2% of fluorine and more than 0·01% of iron	9·6%
ex 29.02 A III	Bromomethane for agricultural purposes (2)	17·0%
ex 29.35 O	Furazolidone	12·8%
ex 29.35 O	Ethoxyquinoline	12·8%
ex 29.35 O	Nitrofurazone	12·8%
ex 38.11 C	Preparations based on 1:2-dibromoethane, containing a maximum of 70% of 1:2-dibromoethane, imported in the form of emulsions containing an emulsifier in the proportion of 3-5% and with xylene or petroleum as a diluent	10·0%
42.03 B III	Gloves, including mitts, other	15·2%
ex 60.03	Stockings of synthetic fibres, finished or unfinished	17·6%
ex 60.05 A	Swimming costumes	16·8%
ex 60.05 A	Outerwear for babies	16·8%
ex 60.06 B	Swimming costumes	16·0%
ex 61.01	Outerwear for men in synthetic fibres	16·0%
ex 61.02 B	Outerwear for women in synthetic fibres	16·0%
ex 61.02 B	Swimming costumes	16·0%
ex 68.12	Pipe fittings of asbestos cement	10·4%
ex 70.05	'Horticultural' glass (2)	8·0% Minimum charge 0·8 u.c. per 100 kg. gross weight (3)
ex 76.03	Aluminium strip for Venetian blinds	12·0%
ex 76.06	Aluminium tubes and pipes for irrigation	15·2%

(1) Over and above the duty the Community reserves the right to levy an additional duty on sugar, equal to the import charge on sugar, and applicable to the quantity of various sugars (calculated in saccharose) contained in this product above 13 per cent in weight.
(2) Inclusion in this sub-heading is subject to conditions to be laid down by the appropriate authorities.
(3) u.c. = Unite de Compte (present value 1 U.S. dollar).

The agreement also provides for alignment on the Common Tariff rates by those Member States at present applying higher duties for such products as oranges, natural citrus fruit juices, certain processed vegetables and asbestos yarns.

Further details of the agreement may be obtained, if required, from the following Board of Trade departments: Commercial Relations and Exports Department, 1 Victoria Street, London, S.W.1 (Tel. Abbey 7877, Ext. 2355/6); Export Services Branch, Hillgate House, 35 Old Bailey, London E.C.4 (Tel. City 5757, Ext. 479).

VISITS OVERSEAS BY UNITED KINGDOM BUSINESSMEN

United Kingdom businessmen travelling overseas are urged, in their own interest, to give advance notice to Trade Commissioners and Foreign Service Officers if they propose to call on them, especially if it is intended to ask for information or other help which it may take time to prepare. It is often advisable to telephone for an appointment on arrival.

Export Services Branch and the Regional Offices of the Board of Trade, if approached, will pass information about pending business visits to Overseas Officers and provide letters of introduction.

Translations of EEC and Euratom Regulations

THE FOLLOWING FURTHER translations of EEC and EURATOM Regulations are now available from H.M. Stationery Office, Kingsway, London, W.C.2, and branches. To obtain copies of these Regulations by post, orders and remittances, including postage, should be addressed to H.M. Stationery Office, P.O. Box 569, Cornwall House, London, S.W.1.

EEC

Regulation No. 15/64 Authorizing the Federal Republic of Germany to take intervention measures to permit the import of cattle from Denmark. Price 5d.

Regulation No. 20/64 Determining the additional amount of levies on poultry eggs in shell. Price 3d.

Regulation No. 21/64 To amend the levy and the sluice-gate price for poultry spines and necks. Price 5d.

EURATOM

Regulation No. 8/63 EURATOM Determining the categories of officials and other servants of the European Atomic Energy Community and the European Economic Community to whom the provisions of Articles 11, 12, second paragraph, and 13 of the Protocols on the privileges and immunities of the Communities apply. Price 8d.
(This Regulation has also been published as Regulation No. 127/63.)

FRANCE

Modifications to Customs Tariff

THE FRENCH *Journal Officiel* of June 18, announced the following amendments to the Customs Tariff of Metropolitan France, Corsica and French Guiana.

Metropolitan France

Tariff No.	Description	Rate of Duty
08.01	Dates, bananas, coconuts, Brazil nuts, cashew nuts, pineapples, avocados, mangoes, guavas and mangosteens, fresh or dried, shelled or not:	
	C. Pineapples	9%
	D. Coconuts, Brazil nuts and cashew nuts:	
	II. Other:	
	a. Coconuts:	
	1. Dehydrated pulp	4%
09.01	Coffee, whether or not roasted or freed of caffeine; coffee husks and skins; coffee substitutes containing coffee in any proportion:	
	A. Coffee:	
	I. Unroasted:	
	a. Not freed of caffeine	12% (1)
09.02	Tea:	
	B. Other	10·8% (2)
09.04	Pepper of the genus "Piper"; pimento of the genus "Capsicum" or the genus "Pimenta":	
	A. Neither crushed nor ground:	
	I. Pepper	17%
09.05	Vanilla	11·5%
09.07	Cloves (whole fruit, cloves and stems):	
	A. Neither crushed nor ground	15%
09.08	Nutmeg, mace and cardamoms:	
	A. Neither crushed nor ground:	
	I. Intended for the industrial manufacture of essential oils or resinoids:	
	a. Nutmeg	15%
	II. Other:	
	b. Other:	
	1. Mace	20%
	2. Cardamoms	13% (3)
18.01	Cocoa beans, whole or broken, raw or roasted	6·7% (4)
	(1) Rate reduced to 9·6%.	
	(2) Duty suspended until December 31, 1965.	
	(3) Duty suspended until December 31, 1965.	
	(4) Rate reduced to 5·4%.	

Corsica

Tariff No.	Description	Rate of Duty
09.01	Coffee, whether or not roasted or freed of caffeine; coffee husks or skins; coffee substitutes containig coffee in any proportion:	
	A. Coffee:	
	I. Unroasted:	
	a. Not freed of caffeine	12% (1)
	(1) Rate reduced to 9·6%	

French Guiana

Tariff No.	Description	Rate of Duty
09.01	Coffee, whether or not roasted or freed from caffeine; coffee husks and skins; coffee substitutes containing coffee in any proportion:	
	A. Coffee:	
	I. Unroasted:	
	a. Not freed of caffeine	12% (1)
09.02	Tea:	
	B. Other	10·8% (2)
09.04	Pepper of the genus "Piper"; pimento of the genus "Capiscum" or the genus "Pimenta":	
	A. Neither crushed nor ground:	
	I. Pepper	17%
09.05	Vanilla	11·5%
09.07	Cloves (whole fruit cloves and stems):	
	A. Neither crushed nor ground	15%
09.08	Nutmeg, mace and cardamoms:	
	A. Neither crushed nor ground:	
	II. Other:	
	a. Nutmeg	15%
	b. Other	6% (3)
	(1) Rate reduced to 9·6%.	
	(2) Duty suspended until December 31, 1965.	
	(3) Duty suspended until December 31, 1965. for cardamoms.	

The French text of this notice may be seen at the Export Services Branch, Board of Trade, Room E13, Hillgate House, 35 Old Bailey, London, E.C.4.

GIBRALTAR

Food and drug regulations

THE BOARD OF TRADE have received copies of supplements to the Gibraltar *Gazettes*, No. 870 of May 22 and No. 873 of June 12, 1964, which replace the existing regulations regarding food and drugs.

A copy of the new regulations may been seen at the Export Services Branch, (Tariff Division), Board of Trade, Room E48, Hillgate House, 35 Old Bailey, London, E.C.4 (Tel. City 5757, Ext. 471).

MOROCCO

Customs tariff modifications

THE MOROCCAN *Bulletin Officiel* of May 27, 1964, gave details of further modifications to the table of Customs duties (*ad valorem*) levied on importation into Morocco. The new rates came into effect as from June 1, 1964, and are as follows:

Tariff No.	Description	Tariff	
		General Tariff	Working Tariff
48-01	Paper and paperboard; articles of paper pulp (including cellulose):		
	1. Paper and paperboard in rolls or sheets:		
	Mechanically manufactured, including cellulose wadding:		
	A. Newsprint:		
	I. For printing newspapers and periodicals, under the conditions as to use stipulated by current legislation.	50	Ex.
	II. Other	50	35
	B. Cigarette papers	50	10
	C. Kraft paper and cardboard:		
	I. Paper for manufacture of paper yarn, called 'Kraft in yarn' of a weight of 40 to 45 grammes per square metre, imported in rolls for manufacture of matches and sent direct to the factory.	50	15
	II. Other:		
	(a) Weighing 70 grammes or more per square metre, in rolls of a minimum weight of 500 kilos, for use in cement sack making or box making, imported by the manufacturers and sent direct to the factory	50	10
	(b) Other:		
	1. Coated on one or both sides	50	25
	2. Other	50	25
	D. Other:		
	I. For newspapers and periodicals under the conditions as to use stipulated by current legislation	50	Ex.
	II. Paper for electric condensers	50	10
	III. Wool paper or paperboard (containing 50% or more of wool)	50	10
	IV. Cellulose wadding.	50	20
	V. Straw paper and paperboard, including paper or paperboard of which the core or one side is straw.	50	25

Continued on next page

MOROCCO, *continued*

Tariff No.	Description	Tariff: General Tariff	Tariff: Working Tariff
	VI		
	(a) Of a weight per square metre greater than 440 grammes, in rolls of more than 2 metres wide, for the box making industry, imported by manufacturers and sent direct to the factory	50	10
	(b) Of a weight per square metre between 156 and 173 grammes, in rolls, for the manufacture of statistic cards imported by firms and sent direct to the factory or (c) office	50	10
	Other, of a weight per square metre:		
	(1) Less than or equal to 250 grammes	50	35
	(2) More than 250 grammes	50	25
48-02	Hand-made paper or paperboard	50	35
48-03	Parchment papers and imitations thereof, including 'crystal' paper, in rolls or sheets:		
	A. Sulphurized paper and paperboard	50	20
	B. Natural tracing paper	50	20
	C. Other	50	30
48-04	Composite paper and paperboard, composed of layers stuck flat together with adhesive, not surface-coated or impregnated, whether or not internally reinforced in rolls or sheets:		
	A. Kraft paper and paperboard	50	20
	B. Other	50	25
48-05	Paper and paperboard corrugated (with or without flat surface sheets), creped, crinkled, embossed or perforated, in rolls or sheets:		
	A. Kraft paper and paperboard	50	20
	B. Other	50	35
48-06	Paper and paperboard, lined, ruled or squared, in rolls or sheets	50	50
48-07	Paper and paperboard, impregnated, coated, surface coloured (printed or surface-marbled or similar) (other than those of 48-06 or Chapter 49) in rolls or sheets:		
	A. Tarred, bitumized, asphalted, fortified or not, whether or not covered with sand or similar substances	50	30
	B. Other:		
	(1) Surface-coloured, not coated	50	35
	(2) White or colour-coated of a weight per square metre:		
	(a) Less than 120 grammes	50	35
	(b) Equal to or more than 120 grammes	50	20
	(3) Adhesive	50	20
	(4) Paraffined, stearined, or waxed	50	35
	(5) Paper or paperboard coated or impregnated with artificial resins or artificial plastics material; nitrocellulosed paper and paperboard	50	20
	(6) Carbon or chemical papers or similar	50	20
	(7) Printed:		
	(a) In the form of rolls of waterproofed paperboard of a width from 20 to 30 centimetres	80	20
	(b) Other	80	50
	(8) Other	50	20
48-08	No change.		
48-09	No change.		
48-10 to 13	No change.		
48-14	Articles for use in correspondence; writing blocks, envelopes, letter cards, plain post-cards, correspondence cards; boxes, pouches, wallets, etc., containing only an assortment of paper stationery	80	50
48-15	Other paper and paperboard, cut to size or shape	80	45
48-16	Boxes, bags and other packing containers:		
	A. Paper containers:		
	I. Boxes, bags and similar, of which the outside is:		
	(a) Of kraft paper in one or two layers:		
	(1) Large-capacity bags with a minimum measurement of 50 cm. wide and 65 cm. long lying flat	80	30
	(2) Other	80	40
	(b) In other papers	80	40
	B. Cardboard containers:		
	I. Collapsible cases of corrugated or strong paperboard	80	30
	II. Other	80	40
48-17	Boxes for use in shops, offices and similar:	80	40
48-18	Registers, exercise, note, memo, order and receipt books and similar file, album and book covers and similar scholastic or office stationery:		
	A. Registers, exercise books, note books, memo-pads for offices (with or without calendars) and similar	80	50
	B. Other	80	45
48-19	Paper or paperboard labels, whether or not printed or gummed	80	45
48-20	Bobbins, spools, cops and similar supports of paper pulp, paper or paperboard, whether or not perforated or hardened	30	15
48-21	Other articles of paper pulp, paper, paperboard or cellulose wadding:		
	A. Printed cards for statistical machines	80	25
	B. Frames for electric coils, perforated cards for Jacquard attachments and the like, impressed flongs for printing, and matrices, conditioned filters, joints and similar, moulded sheets for packing eggs, suitcase corners	30	15
	C. Other	80	45
49-01 to 49-08	No change.		
49-09	Picture postcards, Christmas cards and similar greetings cards, printed by any process, with or without trimmings:		
	A. Picture postcards:		
	I. Reproducing localities, sites, or scenery specifically Moroccan, or subjects or scenes characteristic of Moroccan folklore	50	20
	II. Other	50	40
	B. Other (birthday, Christmas, etc.)	50	40
49-10	Calendars of all kinds, of paper or paperboard, including calendar blocks with removable slips for each day:		
	A. Calendars which are illustrated, directly printed on to paper or paperboard, without tear-off blocks, and without commercial advertising	80	30
	B. Other	80	50
49-11	Printed pictures, engravings, photographs and other printed matter, produced by any process:		
	A. Advertising matter:		
	I. Printed matter and bills of paper, advertising invitations to the public to visit foreign countries or attend foreign events of a tourist, cultural, artistic or sporting nature, provided that they are distributed free of charge, that they do not contain more than 50% of commercial advertising and that the aim of tourist, cultural, artistic or sporting propaganda is clearly evident	Ex.	Ex.
	II. Other	80	50
	B. Circulars of limited topicality or of an international nature, sent to tourist bodies authorized as such by their associations or federations abroad	Ex.	Ex.
	C. Photographs not elsewhere specified:		
	I. Aerial or panoramic photos of land, whether or not of a topographical nature insofar as they do not constitute a cartographical production which can be utilized as such	50	Ex.
	II. Other	60	30
	D. Other printed matter and reproductions, not elsewhere specified	80	50

Inquiries regarding these modifications should be addressed to Export Services Branch, Board of Trade, Room E13, Hillgate House, 35 Old Bailey, London, E.C.4.

SIERRA LEONE

Customs tariff amendment

CUSTOMS TARIFF (Amendment) (No. 3) Order, 1964, published in the Sierra Leone *Official Gazette of* June 5, 1964, amends with effect from May 27 item 40 of the First Schedule of the Customs Tariff (published in the *Board of Trade Journal* of April 10, 1964, page 815) as follows:

First Schedule – Import Duties.

Item	Goods	Unit	Preferential Tariff	General Tariff
40	Umbrellas and parasols.	Each	6s. 0d. or 28½% *ad val.* whichever is the higher.	6s. 0d. or 32½% *ad val.* whichever is the higher.

NORTHERN RHODESIA

Customs tariff amendment

THE Customs and Excise Duties (Amendment) (No. 4) Order 1964 published as Northern Rhodesia Government Notice No. 262 of May 16, amends the Customs Tariff by the repeal of paragraph (e) of item 129 (other than the notes relating thereto) and by the substitution therefor of the following item:

	Item	Duty A	Duty B	Duty C	Duty D
129 (e)	Component parts and materials imported for use in the manufacture of motor vehicles described in sub-paragraph (i) of paragraph (a) of this item (excluding motor caravans), panel vans and pick-up vehicles falling within sub-paragraph (i) of paragraph (b) of this item; in such form and under such conditions as the Controller may approve *ad val*	25%	15%	5%	5%

Note: Sub-paragraph (i) of paragraph 129 (a) relates to motor cars including coupe-imps, station-wagons, safari-vans and general purpose passenger vehicles. Sub-paragraph (i) of paragraph 129 (b) relates to lorries and vans.

SOUTHERN RHODESIA

Customs tariff changes

THE CUSTOMS and Excise Tariff (Amendment) Notice of Motion, 1964 (No. 3), published as Southern Rhodesia Government Notice No. 440 of June 19, gives details of changes in the customs tariff. The items affected and the new rates of duty are as follows:

Part II (Britain pays the column D rate of Duty).

Tariff Item	Item	Duty A	Duty B	Duty C	Duty D
131	(1) Packing and lagging for engines, machinery, piping and buildings, excluding white and red leads and zinc oxide, but including filling and sealing materials designed specially for expansion joints in concrete and similar constructions:				
	(a) Expanded polystyrene, in sheet, strip or block form, having no side exceeding 3 feet . . . *ad. val.*	25%	20%	15%	15%
	(b) Other . . . *ad. val.*	10%	5%	Free	Free
160	(2) Bottles, jars or pots (common), ampoules and tubular containers n.e.e.: empty and designed solely as ordinary trade packages and having no specific secondary use, including bottles and syphons ordinarily used for aerated waters, and fruit jars, but excluding sparklet and similar syphons:				
	(a) of glass, being colourless or of a colour known in the trade as amber:				
	(i) Of a type commonly used for milk, beer or carbonated beverages, but excluding syphons *ad val*	10%	5%	Free	Free
	(ii) Jars and pots of a type commonly used for ointments and pomades, of a fluid capacity of not less than 1 oz. or more than 3 oz. . . *ad val.*	10%	5%	Free	Free
	(iii) Other, of a fluid capacity exceeding 6 oz. but not more than 28 oz., excluding syphons, medical flats, wickered or similarly covered, graduated, moulded to simulate cut glass, and tubular containers . *ad val.*	10%	5%	Free	Free
	(b) Other . . *ad val.*	10%	5%	Free	Free

NYASALAND

Suspensions of duty

THE CUSTOMS and Excise (Suspension) Regulations, 1964, published as Nyasaland Government Notice No. 181, provide for the following suspensions of duty with effect from June 1.:

	Item	Effective Rates			
		Duty A	Duty B	Duty C	Duty D
Ex 69 (a) (v)	Crash helmets	Free	Free	Free	Free
ex 129 (d) (iv)	Safety belts, made up for use in vehicles or boats . . .	Free	Free	Free	Free
ex 203 (1)	Reflective paints as may be approved by the Controller . . .	Free	Free	Free	Free
ex 331 (2)	Reflective liquids as may be approved by the Controller .	Free	Free	Free	Free
ex 331 (2)	Reflective tape and sheeting as may be approved by the Controller .	Free	Free	Free	Free

The Regulations also provide for the suspension of duty on the following goods, where such goods are imported in connection with the Malawi Independence Trade Fair:

	Item	Effective Rates			
		Duty A	Duty B	Duty C	Duty D
ex 296 (1) (e)	Advertising calendars, catalogues, price lists and other advertising matter, n.e.e.	Free	Free	Free	Free

The Customs and Excise (Suspension) (Amendment) Regulations, 1964, published as Nyasaland Government Notice No. 183, amend the former Federal Customs and Excise (Suspension) Regulations, 1963 with effect from June 1 and provide that the suspension of duty on the goods listed in the Second Schedule of the Regulations is extended to imports of these goods grown, produced or manufactured in Malaysia, Ghana, Kenya, Nigeria, Sierra Leone and Zanzibar.

AUSTRALIA

Import licensing schedule

A NOTICE was published in the *Board of Trade Journal* on August 9, 1963, (page 319), giving details of the revised schedule of Categories of goods remaining subject to import licensing controls in Australia.

Amendments were published on December 13, 1963, (page 1343), January 31, 1964, (page 240) and May 29, 1964, (page 1190).

The Australian Department of Trade and Industry has now advised that the following amendment should be made to the Schedule of Categories:

Category Item	Short Description	Licensing Treatment
Delete:—		
ex 139 A 1	Aluminium ingots . . . . . (Grouped with ex 139 A 2 Aluminium alloy ingots.)	ADM.
ex 139 A 1	Balance – other unwrought aluminium	ADM.
ex 139 A 2	Aluminium alloy ingots . . . . . (Grouped with ex 139 A 1 aluminium ingots).	ADM.
ex 139 A 2	Balance – other unwrought aluminium alloys . . .	ADM
ex 139 A 3	Aluminium and aluminium alloy dross	ADM.
ex 139 A 3	Aluminium and aluminium alloy waste and scrap – Balance .	ADM.
Insert:—		
ex 139 A 1	Aluminium – unwrought	ADM.
ex 139 A 2	Dross	ADM.
ex 139 A 3	Balance	ADM.

Substitute notice

THE AUSTRALIAN Customs and Excise Substitute Notice No. 1 (published in full in the *Board of Trade Journal* on January 12, 1962, page 82) is amended by Substitute Notice No. 28, as follows:

Substitute Notice No. 28

Substitute Notice No. 1 is amended by deleting from the first and second columns the goods shown below:

FIRST COLUMN (Substitute)	SECOND COLUMN (Dutiable Goods for which Goods in First Column are Substitutes).
Alkyl sulphonic esters of phenol or cresols or phenol or cresols of types suitable for for use as artificial resin platicisers.	Phthalic esters, being chemicals, covered by Item 280 V.

Parts orders

THE REVISED Parts Order No. 1 published in the *Board of Trade Journal* of October 6, 1961 (page 753) is amended as follows:

Parts Order No. 55

1. This order may be cited as Parts Order No. 55.
2. This order shall take effect from October 18, 1963.
3. Parts Order No. 1 is further amended by adding to the definition of excluded parts in paragraph 3 (1) (2), the following references:
   Tariff Item 176 (L) (2)
   Tariff Item 176 (L) (3)

(*Continued on next page*)

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AUSTRALIA, continued

Tariff board inquiry

THE AUSTRALIAN Minister for Trade has referred to the Tariff Board for inquiry and report the question whether assistance should be accorded the production of **peanuts and vegetable oils** (Tariff Items 92 (E) and 230 (A)).

This reference has been made as a result of representations by local producers.

Details of the Tariff Items under which the above-mentioned goods are dutiable are given below:

Note: Specific rates are shown in Australian currency £A125 = £100 Sterling.

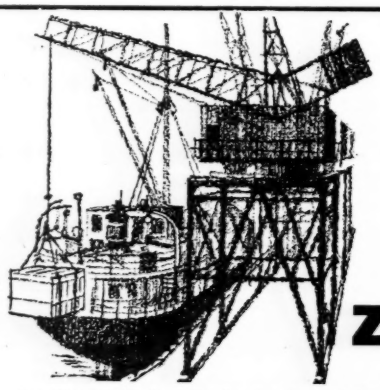
Tariff Item	Goods	British Preferential	Most Favoured Nation	General
92	Oil seeds and oleaginous fruit, whole or broken, of a kind used for the extraction of edible or industrial oils and fats, bnt not including olives cocoa beans, coconuts (other than copra) roasted groundnuts or seeds and fruit used primarily for purposes other than the extraction of oil:			
	(E) Groundnuts (peanuts) and groundnut kernels per cental.	£2 1s. 8d.	£3 6s. 8d.	£3 6s. 8d.
230	(A) Fixed vegetable oils, fluid or solid, crude refined or purified:			
	(1) As prescribed by Departmental By-laws:			
	(a) For all purposes	Free	Free	Free
	(b) For denaturation per gallon	Free	4d.	4d.
	(c) For denaturation otherwise than as prescribed under sub-paragraph (b) per gallon	1s. 2d.	1s. 6d.	1s. 6d.
	(d) Soya bean, for denaturation per gallon *and*, in addition, a temporary duty as follows: for each 1d., or part thereof by which the F.O.B. price is less than 9s. 6d., per gallon per gallon provided that, in respect of such goods in direct transit to Australia on November 28, 1963, which are entered for home consumption on arrival, no temporary duty shall be payable.	1s. 8d. 1d.	2s. 0d. 1d.	2s. 0d. 1d.
	(2) (a) Babassu	Free	Free	Free
	(b) Rape seed	Free	Free	Free
	(c) Palm kernel	Free	Free	Free
	(d) Tung	Free	Free	Free
	(e) Oiticica	Free	Free	Free
	(f) Coconut, crude (i.e. having a free fatty acid content exceeding 0·25% calculated as oleic acid)	Free	Free	Free
	(g) Palm, other than edible grades	Free	Free	Free
	(3) Olive per gallon	3s. 6d.	4s. 0d.	4s. 6d.
	(4) (a) Peanut per gallon	2s. 8d.	4s. 0d.	4s. 0d.
	(b) Palm, edible grades per gallon	2s. 8d.	4s. 0d.	4s. 0d.
	(c) Cotton seed per gallon	2s. 8d.	4s. 0d.	4s. 0d.
	(d) Maize per gallon	2s. 8d.	4s. 0d.	4s. 0d.
	(e) Sunflower seed per gallon	2s. 8d.	4s. 0d.	4s. 0d.
	(f) Soya bean per gallon *and*, in addition, a temporary duty as follows: for each 1d., or part thereof by which the F.O.B. price is less than 9s. 6d., per gallon per gallon provided that, in respect of such goods in direct transit to Australia on November 28, 1963, which are entered for home consumption on arrival, no temporary duty shall be payable.	2s. 0d. 1d.	4s. 0d. 1d.	4s. 0d. 1d.
	(5) (a) Castor per gallon	6¾d.	1s. 0d.	1s. 0d.
	(b) Safflower seed per gallon *and*, in addition, a temporary duty as follows: for each 1d., or part thereof by which the F.O.B. price is less than 12s. 6d., per gallon provided that, in respect of such goods in direct transit to Australia on November, 1963, which are entered for home consumption on arrival, no temporary duty shall be payable.	1s. 10d. 1d.	2s. 0d. 1d.	2s. 0d. 1d.
	(c) Linseed per gallon *and*, for each 3d., by which the F.O.B. price is less than 10s., per gallon, an additional duty of *ad val.*	4s. 6d. 2%	4s. 6d. 2%	4s. 6d. 2%
	(6) Japan wax; myrtle wax; vegetable tallows per cwt.	7s. 0d.	14s. 0d.	14s. 0d.
	(7) Other inedible type oils per gallon per gallon	1s. 3d.	1s. 6d.	1s. 6d.
	(8) Other per gallon	Free	1s. 4d.	1s. 4d.

This matter has been reported by telegraph by the British Senior Trade Commissioner at Canberra, who has been asked by the Australian authorities to notify them at the earliest possible date if any United Kingdom interests propose to tender evidence. In accordance with normal procedure, notification in this instance should be given to the Australian authorities **not later than July 21**. Before this date, therefore, United Kingdom Trade Associations or firms intending to submit evidence to the Tariff Board should so advise the Commercial Relations and Exports Department, Board of Trade, 1 Victoria Street, London, S.W.1, quoting reference No. C.R.E. 8481/64.

Tariff changes

CHANGES HAVE BEEN made in the Australian Tariff affecting (a) the tariff item number of and (b) the rate of duty payable on high negative temperature co-efficient resistors.

Details of these changes will be published in the *Board of Trade Journal* as soon as possible, and meanwhile, may be obtained from Export Services Branch, Board of Trade, Hillgate House, 35 Old Bailey, London, E.C.4. (Tel. City 5757, Ext. 468).



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RECORD TRADING PROFIT

CREDITABLE EXPORT PERFORMANCE

MR. J. F. HOLMAN ON THE OUTLOOK

The Annual General Meeting of Holman Brothers Limited, will be held on July 16 at the Dorchester Hotel, Park Lane, London, W.1.

The following is the Statement by the Chairman, Mr. J. F. Holman, circulated with the report and accounts:—

The improvement in trading conditions to which I referred in my last statement continued throughout 1963/64 and this coupled with the continuance of our efforts to achieve greater efficiency within the Group, has resulted in a most gratifying increase in the Group Trading Profit.

The total sales turnover of the Group showed a substantial increase. This was most marked in the United Kingdom, largely as a result of increased sales of Rotair portable compressors and Maxam fluid power equipment and to a lesser extent, of all other Group products.

Overseas sales also showed a very satisfactory increase but, because of the increase in sales in the United Kingdom, the proportion of sales overseas fell from 71% to 69% of the Group total. An export performance of this magnitude is most creditable, particularly in view of the intense competition which prevails and it reflects great credit on our Sales Organization throughout the world.

South Africa and Rhodesia

Our subsidiary company in the Republic of South Africa, Holman Brothers (Pty.) Ltd., is now deriving benefits from the re-organization which has been carried out in recent years and a small increase in turnover has resulted in higher profits before taxation. However, the change in the basis of assessing tax, which benefited the 1962/63 results, did not apply this year and the net profit is virtually unchanged. I must again emphasize that this is a market in which extremely low and unrealistic prices prevail for our range of mining equipment and until this situation can be improved it will remain difficult to obtain a return commensurate with the capital employed in this subsidiary.

The turnover of Holman Brothers Rhodesia (Private) Ltd., was slightly less than a year ago, but it was able to make a contribution to Group profits. In view of the political situation in the territories concerned the Board already has plans under consideration for the future operation in this subsidiary.

Australia, Canada and India

Holman Brothers (Australia) Pty. Ltd. obtained a very satisfactory increase in sales and as this was not accompanied by a proportionate increase in overheads the profits showed a considerable improvement.

Holman Brothers (Canada) Ltd. have achieved a very substantial increase in sales and a contributory factor to this has been their considerable success in selling within the United States. Selling expenses in both these countries are extremely high however and the profit continues to be low when expressed as a percentage of turnover. Nevertheless, the contribution to Group profits showed an encouraging increase.

In India Holman-Climax Manufacturing Ltd. is developing in a most satisfactory way, both as regards the quality of the products it manufactures and the volume of turnover. Considerable difficulties and problems inevitably attend the setting up of a project of this nature but most of these have been successfully overcome. The selling company which was based on Bombay was allowed to run down during the year and from April 1st, 1964, the responsibility for its activities was assumed by the manufacturing company and our distributors. This allows for concentration of effort in Calcutta where we now have a fully integrated organization. The combined results of our activities in India made a creditable addition to Group profits, although the incidence of taxation generally in that country has now reached a penal level.

African and other subsidiaries

The conditions under which Holman Brothers (Ghana) Ltd. operates have been mentioned in previous statements and it is unfortunate that these have worsened during the year under review. It is satisfactory, therefore, that sales, although not reaching the budget level, showed an improvement over the previous year and the company achieved a reasonable pre-tax profit. Taxation in Ghana continues to increase and the effect of the severe import restrictions recently imposed by the Ghana Government is bound to create further difficulties.

Holman Brothers (East Africa) Ltd. continues to be affected by the unsettled conditions in Kenya, Uganda and Tanganyika, and in the circumstances they did very well to obtain sales which were only marginally less than a year ago, although the profit showed some reduction.

Holman Brothers (Nigeria) Ltd. was unable to maintain turnover at the high level achieved last year but the final contribution to Group profits was approximately the same. If this country goes ahead as is generally expected our well established position there should be very much to our advantage.

We are encouraged by the growth in sales and manufacturing activities being achieved by our associate companies in France and Spain. Climax-France S.A. manufactures and sells Maxam fluid power equipment and Holman Iberica S.A. a limited range of compressors, rock drills and tools. Both companies continue to operate on a sound profit-earning basis.

Improvements and new models

The sales of certain Holman and Climax products such as compressors, road breakers and rock drills have gone up very considerably during the year. As a result of the success of the Rotair range

Holman Brothers, Limited (*Continued*)

of screw-type portable compressors we have increased our production facilities in order to satisfy the demand for this product. Continuing development has led to additions and improvements being made to our range of rock drills and percussive tools. It has also led to the introduction of a further model in the Rotair range; and two further models are now going into production and will be available during the current year. We have introduced our Silent Series version of the Rotair portable compressor and a recent demonstration proved that we have succeeded in effecting a remarkable reduction in the noise level normally associated with this type of equipment. We anticipate a lively interest in this development when it goes into production.

Sales of Maxam fluid power equipment for low cost automation showed a further substantial increase accompanied by an improvement in profit margins and consequently a most satisfactory profit accrued to the Group. This is a division of our business to which great attention has been given in recent years, since it serves a broadly based and rapidly expanding market. Results to date are most encouraging and we have grounds for expecting continued growth.

Goodyear Pump sales have shown an increase and some progress has been made in dealing with the technical problems to which I referred last year. This division, however, is not yet operating at a profit.

Balance sheet items

Turning now to the Balance Sheet of the Group, there was a further substantial reduction in the value of Stocks and Work in Progress in spite of the necessity to build up certain stocks to meet the increased demand. Efforts to reduce stocks still further are being fully maintained but it is unlikely that the downward trend can continue at the same rate as has been seen in the last three years, especially if sales increase in line with our sales forecast.

Trade and Other Debtors and Bills Receivable show a substantial increase but no more than would be expected with the higher volume of trading referred to earlier.

The Bank Overdraft of the Parent Company has been reduced to £11,833 but overseas companies' overdrafts have increased as a result of our deliberate policy to make these companies self-financing. The cash position of the Group, however, has shown a very satisfactory improvement.

During the year a further £31,000 of the company's 6 % Debenture Stock 1977/82 was purchased for redemption in accordance with the conditions of the Trust Deed.

Centralization at Camborne

In my statement last year I referred to the consideration that was being given to the problem of centralizing all the Group's activities in Camborne. Further studies continued this year and resulted in a forward plan which the Board used as the basis for authorizing a scheme of development which should meet our requirements for a number of years to come. The whole of our manufacturing and administration units, with only minor exceptions, will operate within one compact area. Many of them will be housed in new buildings of modern design, and plans have been finalised for a new administration building with a total floor area of some 50,000 square feet. John Mowlem and Co. Ltd. are the main contractors for the scheme and have complied with our request to make the maximum possible use of local sub-contractors. Substantial progress has been made, work is up to target date and the first major move, that of the transfer of the portable compressor assembly department, was completed at the end of March.

The financial aspects of a scheme of such magnitude as this have had the close consideration of the Board and I am pleased to say that we have received the utmost support of the Board of Trade. In view of our location in a Development Area grants towards the cost of buildings and plant have been promised, together with substantial loan facilities, and it is felt that these will cover a large part of the total cost. Funds generated within the company, together with normal financing facilities, should be sufficient to provide the balance of the capital cost and the additional working capital that will be required. In order to facilitate financial arrangements it has been thought desirable to offer to the holders of £268,500 4¼ per cent Debenture Stock 1970/80 of our wholly owned subsidiary Climax Rock Drill & Engineering Ltd. an equal amount of new Holman Brothers, Limited, 4¾ per cent Debenture Stock 1970/80 and documents to this effect have been circulated to the Climax stockholders.

Trading profit exceeds £1,000,000

Referring now to the Consolidated Profit and Loss Account for the year, it gives me very great pleasure to report an increase in Trading Profit before taxation from £317,204 to £1,032,302 and although the proportion absorbed by taxation shows a small increase the net profit attributable to the Parent Company has increased from £135,974 to £456,496. This record figure of over one million pounds Trading Profit clearly marks yet another milestone in the history of the company.

Your Board feels that the provision of Pensions should receive the careful and sympathetic consideration of all good employers and from time to time alterations have been made to our arrangements with a view to improving benefits. A review of our pension arrangements is currently in hand and whilst no details have yet been finalised it is obvious to us that additional sums will be required in respect of past services; it is with this in mind that we have transferred from Revenue Reserves to Provision for Pensions the sum of £100,000. From the information presently available to us, and to provide the benefits which we consider desirable, additional provision will probably be required and this will be assessed during the course of the current year.

Dividend and scrip issue

When the announcement of the Interim Dividend was made in December 1963 your Board had in mind not only the improved trading results to date but also the desirability of reducing the disparity which had previously existed between the amounts of Interim and Final Dividends. It was felt that the combination of these circumstances warranted an Interim payment of 5 % less tax. Your Directors now recommend for your approval a Final Dividend of 20 per cent less tax making a total for the year of 25 per cent less tax. Your Directors also recommend the issue of Ordinary Shares of 10s. each credited as fully paid in the ratio of one new share for every three held. This issue must not be taken to imply any increase in the total amount paid out by way of dividends in the future.

It is realized that the Final Dividend now proposed will result in a continuing disparity with the Interim but this matter will have the consideration of the Board when the time comes for payment of an Interim for the current year.

Another good year envisaged

This statement will be in your hands earlier this year than previously; consequently it is more difficut to give you an indication of prospects since less elapsed time means that less information is available on the current year's performance.

I can say, however, that the year has started well as regards deliveries, orders received, and work in hand. In 1964-65 we have to bear the full effect of the National Wages Award granted in December 1963; other costs over which we have no control continue to rise and political and economic difficulties remain in many of the countries in which we trade. However, I am confident that the sustained efforts we are making to achieve economies in administration and production will more than offset these difficulties. Therefore, in the absence of unforeseen circumstances, I look forward to another good year.

During the course of the year Mr. J. L. Ritchie was offered a Managing Directorship with a well-known group and it was with considerable regret that we accepted his resignation. Mr. Ritchie had been Sales Director for five years and during this period he made a valuable contribution towards the improvement that now has taken place in the Company's affairs. We wish him every success in his new appointment.

Tribute to employees

In paying a tribute to our employees a year ago, I referred to the rather difficult years through which we had passed but which had led to no diminution of effort or enthusiasm. This year just ended has called for further efforts in connection with the planning of our centralization scheme at a time when all departments were having to deal with the much higher levels of production and sales. All demands have once again been met and it gives me great pleasure to express the Board's appreciation to all employees throughout the world for their loyal services during the year, and I feel sure that all shareholders will be equally appreciative.

NEW ZEALAND

Customs tariff inquiry (A)

THE NEW ZEALAND Tariff and Development Board has announced that it proposes to inquire into and report on the rates of import duty which should be imposed on battery illuminated 35 mm transparency slide viewers covered by the following tariff item and the import licensing position as affecting such articles.

Item No.	Tariff and Statistical Items	Rates of Duty				
		British Preferential	Australian Agreement	Canadian Agreement	Most-Favoured Nation	General Tariff
861.390.9	Optical appliances and instruments (but not including lighting appliances), n.e.i.	Free	..	..	20%	25%

The public inquiry will take place in the Board Room, First Floor, New Zealand Law Society Building, Waring Taylor Street, Wellington on Tuesday, September 15, 1964 at 10 a.m. Typewritten statements of evidence (twelve copies) should be lodged with Mr. N. V. Farrant, Secretary, Tariff and Development Board, P.O. Box 5070, Wellington, New Zealand not later than Tuesday, September 1, 1964.

Customs tariff inquiry (B)

THE NEW ZEALAND Tariff and Development Board has announced that it has been requested by the Minister of Customs to inquire into and report to him on certain types of paper and paperboard as to the rates of duty which should be imposed, the basis of issuing import licences, methods of distribution adopted by the manufacturers and the prices charged by them and whether the description of the goods for which a higher rate of duty has been requested is adequate.

A full list of the items of paper and paperboard covered can be seen at the Board of Trade, Room E54, Hillgate House, 35 Old Bailey, London, E.C.4. (Tel. City 5757, Ext. 468). Types included in the following Tariff Items are concerned in the inquiry.

Item No.	Tariff and Statistical Items	Rates of Duty				
		British Preferential	Australian Agreement	Canadian Agreement	Most-Favoured Nation	General Tariff
	Printing (except newsprint) and writing paper, machine made, not further processed, in rolls or sheets:					
	In sheets:					
	Not less than 300 sq. in. in area:					
Ex 641.210.2	As may be determined by the Minister	20%	Such rate of duty not exceeding .. 20% as the Minister may in any case direct		30%	50%
Ex 641.210.9	Other	Free	..	Free	10%	12½%
	In rolls:					
	10 in. and wider:					
Ex 641.211.2	As may be determined by the Minister	20%	Such rate of duty not exceeding .. .. as the Minister may in any case direct		30%	35%
Ex 641.211.9	Other	Free	..	..	10%	25%
	Kraft paper and kraft paperboard, not further processed:					
	Weighing not less than 1¼ oz. per 300 sq. in.:					
	Of size not less than 300 sq. in:					
Ex 641.311.1	As may be determined by the Minister	25%	Such rate of duty not exceeding .. .. as the Minister may in any case direct		..	25%
Ex 641.311.9	Other	Free	..	..	..	Free
	Machine made paper and paperboard, n.e.i., not further processed, in rolls, or sheets:					
	Weighing less than 1¼ oz. per 300 sq. in.:					
	Other kinds:					
	In sheets:					
	Not less than 300 sq. in. in area:					
Ex 641.503.2	As may be determined by the Minister	20%	Such rate of duty not exceeding .. 20% as the Minister may in any case direct		30%	50%
Ex 641.503.9	Other	Free	..	Free	10%	12½%
	Weighing not less than 1¼ oz. per 300 sq. in.:					
	Of size not less than 300 sq. in.:					
Ex 641.505.1	As may be determined by the Minister	25%	Such rate of duty not exceeding .. .. as the Minister may in any case direct		..	25%
Ex 641.505.9	Other	Free	..	..	..	Free
	Composite paper and paperboard made by sticking flat layers together with an adhesive not surface-coated or impregnated, whether or not internally reinforced, in rolls or sheets:					
	Weighing not less than 1¼ oz. per 300 sq. in.:					
	Of size not less than 300 sq. in.:					
Ex 641.923.1	As may be determined by the Minister	25%	Such rate of duty not exceeding .. .. as the Minister may in any case direct		..	25%
Ex 661.923.9	Other	Free	..	..	..	Free

The public inquiry will take place in the Board Room, First Floor, New Zealand Law Society Building, Waring Taylor Street, Wellington, on Monday October 12, 1964 at 10.30 a.m. Typewritten statements of evidence (twelve copies) should be lodged with Mr. N. V. Farrant, Secretary, Tariff and Development Board, P.O. Box 5070, Wellington, New Zealand not later than Monday, September 28, 1964.

Notes for the Guidance of Witnesses, which indicate the kind of information required and the manner in which it should be submitted to the Tariff and Development Board can seen be at the Board of Trade, Room E54, Hillgate House, 35 Old Bailey, London, E.C.4 (Tel. City 5757, Ext. 468). Each statement of evidence will in general need to be presented under oath at the public inquiry by the person tendering it.

British producers are reminded that under Article 8 of the United Kingdom/New Zealand Trade Agreement, 1959, they are entitled to full rights of audience before this Tariff and Development Board. Any changes made are likely to remain in force for a considerable period; any exporters whose trade is likely to be affected are urged to consider seriously the desirability of submitting evidence at the forthcoming inquiry.

The British Photographic Manufacturers Association (with regard to Tariff Inquiry (A)) and the British Paper and Paperboard Makers' Association (with regard to Tariff Inquiry (B)) have been informed and it is suggested that any British firm wishing to give evidence might get in touch with them. Firms proposing to give independent evidence through their agents in New Zealand and requiring further information should approach the Commercial Relations and Exports Department, Board of Trade, 1 Victoria Street, London, S.W.1. (Tel. Abbey 7877. Ext. 2320) quoting reference C.R.E. 8451/64 (Tariff Inquiry (A)) and C.R.E. 8099/64 (Tariff Inquiry (B)).

Any British trade association or firm proposing to submit evidence is asked to advise the Commercial Relations and Exports Department, Board of Trade, 1 Victoria Street, London, S.W.1, of their intention.

(*Continued on page* 48)

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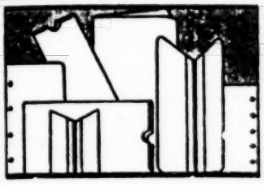

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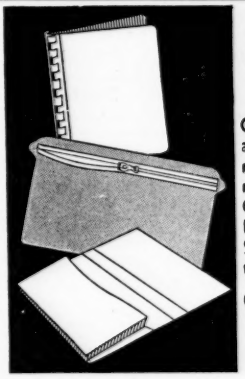

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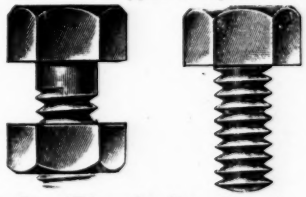

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Board of Trade Departments, etc.

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Board of Trade Addresses	28 Feb. 1694
Board of Trade Regional Organizations	This week
ECGD Local Offices	12 June 1964
British and Commonwealth Chamber of Commerce and other British Business Organizations Overseas	24 April 1964
United States Consular Offices in the UK	21 July 1961

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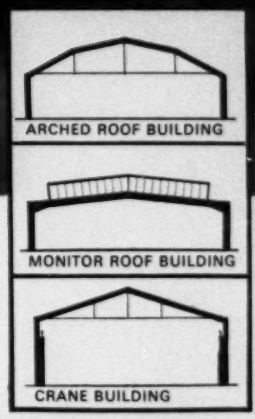

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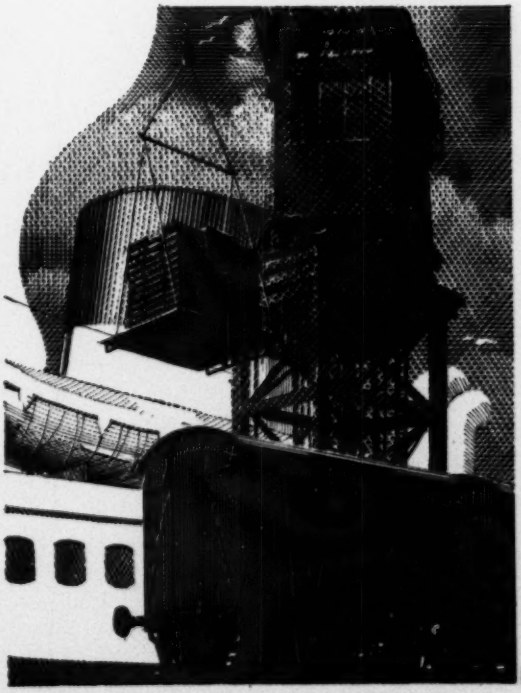

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Foreign trade of the UK:	
Trade by air (6-M)	This week
Unit value and volume index nos. (M)	12 June 1964
Value of overseas trade (M)	26 June 1964
Gold and dollar reserves (M)	12 June 1964
Hire purchase:	
Assets and liabilities of HP companies (Q)	5 June 1964
Business (M)	12 June 1964
Industrial building:	
Provisional figures (Q)	24 April 1964
Industrial production:	
Census, first results (A)	27 Dec. 1963
Index nos. (M)	26 June 1964
N. Ireland Index (M)	This week
Insurance companies:	
Assets (A)	26 June 1964
Transactions (Q)	27 Mar. 1964
Investments and earnings overseas (A)	15 Nov. 1963
Passenger movement to and from UK (Q)	3 April 1964
Pension funds:	
Assets (A)	26 July 1963
Transactions (Q)	3 April 1964
Retail prices index (M)	26 June 1964
Retail trade:	
Index nos. (M)	12 June 1964
N. Ireland index (M)	26 June 1964
Shipping movement at UK ports (Q)	26 June 1964
Stocks:	
Manufacturers and distributors (Q)	12 June 1964
Retail (M)	26 June 1964
Textiles:	
Clothing and textile orders and deliveries (M)	26 June 1964
Man-made fibres production (M)	This week
Wholesale houses sales (M)	22 May 1964
Wool and cotton output (M)	26 June 1964
Tourist traffic (M)	29 May 1964
Wholesale prices:	
Average prices of selected commodities (A)	21 Feb. 1964
Index nos. (M)	12 June 1964

Board of Trade Departments, etc.

Subject	*Last published*
British Commercial Representatives Overseas	24 April 1964
Board of Trade Addresses	28 Feb. 1694
Board of Trade Regional Organizations	This week
ECGD Local Offices	12 June 1964
British and Commonwealth Chamber of Commerce and other British Business Organizations Overseas	24 April 1964
United States Consular Offices in the UK	21 July 1961

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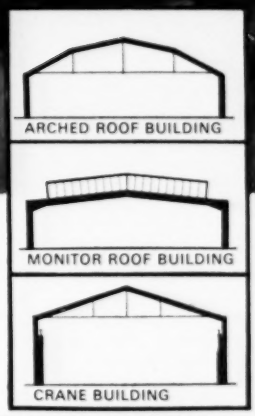

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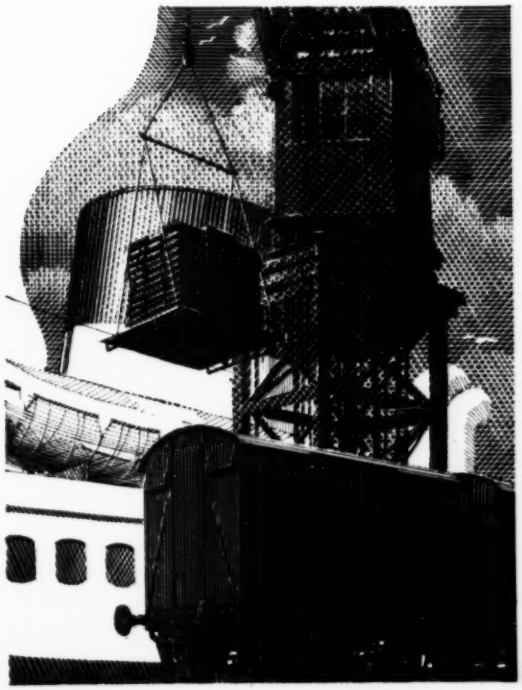

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